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ABSTRACT

This coursebook provides materials for a course to teach supervisors to communicate more effectively. The course is designed to be delivered in six sessions over a 3-week period. Stated course objectives for the participant are as follows: feel more comfortable with supervisory communication; understand language as a means of action and change; feel more comfortable praising, reprimanding, and setting goals; learn to use writing as a management tool; and project a more professional image. An introduction suggests four writing assignments. A section on manager communication contains materials on communication and communication styles. Speaking and listening are addressed in topics of the third section: improving performance with clear goals, active listening, body language, coping with criticism, and confrontation. An exercise on coping with criticism is provided. Writing is covered in the fourth section through these topics: the writing process, purpose and audience, drafting strategies, revising and editing, reviewing the writing of others, and writing tips. The next section presents six readings for the participant: "Communicating in Health Care Settings"; "Why Listening's Not as Easy as It Sounds"; "How to Run a Meeting"; "Writing on the Job"; "Memos"; and "Keep It Short." The last section contains other related materials, such as a sample hospital discipline policy, sample hospital performance evaluation and a communication skills self-assessment form. (YLB)

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Mejor Comunicacion
Mejores Oportunidades
Dedicados en Mejorar la Comunicacion acerca del Cuidado de la Salud
Colaboracion de New Mexico State University y Memorial Medical Center

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Committed to Improved Health Care Communication
A Partnership between New Mexico State University and Memorial Medical Center

presents

Communication for Supervisors

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Communication for Supervisors

An offering of Step *Ahead:*

A Partnership for Improved Health Care Communication between Memorial Medical Center and New Mexico State University

Communications for Supervisors was developed by **Step *Ahead***: A Partnership for Improved Health Care Communication. **Step *Ahead*** is funded in large part by the U. S. Department of Education as a National Workplace Literacy Demonstration Project. Our other partners include: The Coalition for Literacy, Santa Fe; and The Literacy Volunteers, Dona Ana Branch Community College, Las Cruces.

As a demonstration project, we are eager to share these materials with others who are engaged in not-for-profit literacy work. If you would like to use our materials, please write for permission to:

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We gratefully acknowledge the assistance of our partner organizations and especially wish to thank our many students who told us it really did make a difference.

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Session Map
Communication for Supervisors

Week One

Session 1:

Introduction
What's The Agenda?
What is a good manager?
- When I think of good supervisor communication... , p. 4
- When I think of bad supervisor communication....

Communication Styles, p. 6
Assignments:
- Read "Communication in a Healthcare Setting," p. 26

Session 2:

Discuss reading assignment
Improving Performance, p. 8
Listening and responding, p. 10-11
Confrontation and criticism, p. 12-14
Assignments:
- Read "Listening Isn't Easy," p. 33
- Write Assignment #1

Week Two

Session 3:

Discuss reading and writing
Panel discussion with hospital supervisors
Writing performance evaluations
Assignments:
- Write Assignment #2 (sample on p. 69)
- Read "How to Run a Meeting," p. 35

Session 4:

Discuss reading and writing
Writing Process, p. 18
Purpose and Audience Worksheet, p. 19
Drafting Strategies, p. 20
Revise performance evaluation in peer groups
Examine discipline policy from Personnel Manual, p. 65
Assignments:
- Write Assignment #3

Read "Writing on the Job" (p. 50) and "Memos" (p. 57)

Week Three

Session 5:

Discuss reading and writing
Discuss Revising and Editing Checklist, p. 21
Discuss Reviewing the Writing of Others, p. 22
Strategies for Quick Writing, p. 24
Peer revision of reprimand
Assignments:

Read "Keep it Short," p. 62

Write Assignment #4

Session 6:

Discuss reading and writing
Self evaluations
Course evaluation

What's the Agenda?

At the end of this course, participants should:

- ❒ feel more comfortable with supervisory communication
- ❒ understand language as a means of action and change
- ❒ feel more comfortable praising, reprimanding and setting goals
- ❒ learn to use writing as a management tool
- ❒ project a more professional image
- ❒ _____
- ❒ _____
- ❒ _____
- ❒ _____
- ❒ _____

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Points to Remember

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

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Writing Assignments

Assignment #1

Write a memo to your manager suggesting a change in policy or procedure that will improve your department. Maybe you have an idea for better handling certain substances or for keeping records on incoming calls. The suggestion might involve medical leave, promotions, performance appraisals, scheduling, or overtime. As you write the memo, imagine what information you will need to include to make the suggestion appealing to your manager.

Assignment #2

Write a performance evaluation for an employee. Be specific about both positive and negative aspects of the employee's performance. Remember, focus on behavior, not on personality.

Assignment #3

Write a reprimand for an employee's file. Follow hospital policies. Attend to the behavior you want to change, but also try to think about how the reprimand can best improve the performance of your employee.

Assignment #4

Fill out the communication skills self assessment on pages 76-78. The self-assessment should help you identify areas where you do well and areas that you need to improve. Think of the assignment like you did the employee performance evaluation. Be prepared to discuss what you discovered in class.

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Focusing on Communication

Let's get started by thinking about supervisor communication in a hospital. Think about those supervisors and managers you work under and those you have observed at MMC. Focus on the ways they communicate with their staff. Then complete the following thoughts:

When I think of bad supervisor communication, I think of . . . .

When I think of good supervisor communication, I think of . . . .

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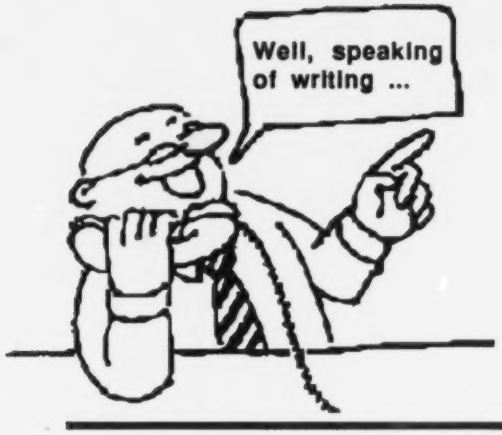
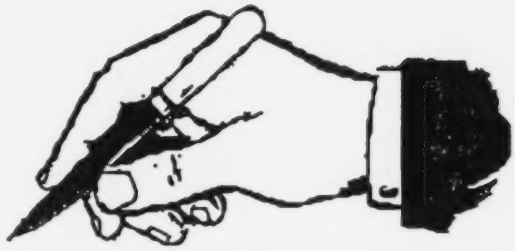
Speaking vs. Writing





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What's Your Communication Style?

Conflict sometimes arises when you are trying to discuss a problem with someone who has a different communication style than you do. Each person has her own way of communicating that makes her feel comfortable. When someone who is action-oriented is having a discussion with someone who is idea-oriented, there can be conflict. The action-oriented person wants to *do* something; she will push for some kind of action. The idea-oriented person likes to consider things, to think about options. The idea-oriented person will tend to feel rushed when trying to solve problems while the action-oriented person will feel frustrated because the conversation never seems to get anything accomplished.

Action-oriented Communicators

- Let's get it done, move ahead. What's the bottom line?
- Direct, impatient, decisive, quick, energetic.
- Short attention span, tend to interrupt, hate small talk.
- Body language and vocal cues tend to be accurate.

Idea-oriented Communicators

- Let's try something new. Consider this possibility.
- Full of ideas, provocative, difficult to understand.
- Like to challenge others, hate rules and regulations.
- Nonverbal cues and vocal cues vary; when gathering ideas, they like to be alone and may be withdrawn. When promoting ideas, their energy increases.

People-oriented Communicators

- What do we need? How do people feel? What do people believe? Let's form a team. Let's form a committee.
- Spontaneous, empathetic, subjective, hate procedures and rules that fail to consider people as individuals.
- Body language tends to be open and their voices varied.

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Process-oriented Communicators

- What's the procedure? Let's plan, set goals, analyze. Is there a policy statement?
- Systematic, patient, logical, unemotional, cautious.
- Long attention span, hates off-the-cuff reactions.
- Offer minimal body language and vocal cues.

Which communication type are you? How about the people close to you? Write down a conflict you had recently; could it have been because of different communication styles? Explain why. Are there any people (withhold the names to protect the innocent) that you consistently have difficulty with? Could this be the root of the problem?

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Improving Performance with Clear Goals

Many employees complain that they are never sure exactly what they are supposed to be doing. Sometimes they even argue that managers are purposefully unclear about directions so they they have reason to fault workers whenever it's convenient. The same employees often claim that their performance is only recognized if they make a mistake; they argue that they can't get better because they never know when they are doing something right. It doesn't matter if the complaints are accurate or not; if employees feel they are adrift in their responsibilities, there is no chance they will be efficient and productive with their time.

The best way to avoid this confusion is to be as clear as possible about what you want. Take the time to explain what you expect; ask questions to make sure the worker understands what's expected; ask the worker if he has any questions or suggestions. As strange as it sounds, improving a worker's performance often means nothing more than clearly expressing your expectations. Most employees want definite direction.

Here are some simple suggestions that will help improve performance:

Set Goals

We know that these suggestions will take some time, but we believe making communication as clear as possible will increase productivity, and save you time in the long run.

1. Meet with each of your workers and decide what good performance looks like in your setting. It's important that both of you are specific.
2. Make a list of goals that relate specifically to improving or maintaining good performance. We feel it is best to write these goals down –the shorter and more precise, the better – and then give the employee a copy.
3. Explain to the employee that you expect him to review his goals every month to make sure that he is accomplishing what the two of you agreed upon. As a manager you need to read your copy of the goals to remind yourself of the agreement.

Praise People for Accomplishing Goals

One of the things that can be frustrating at a job is feeling that the boss is waiting for you to make a mistake. Positive reinforcement is more valuable than yelling at someone and ruining your own day in the process, so learn to pay attention to people when they do things that right.

1. Make it a habit to praise people as they are doing a good work. Don't wait until the yearly evaluation when it's a faint memory. It's important to be specific, not just "good job," but something like "I like the way you _____. It shows you are thinking about your work."

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2. Get your employee used to the idea that good behavior means being praised regularly.
3. Don't be afraid to express how good their behavior makes you feel, and how it helps the hospital accomplish its larger mission. Encourage the worker to continue.
4. Make physical contact with the employee if it's comfortable. Make eye contact, shake their hand, touch an arm or a shoulder.

Make them feel good about doing good work. These people will help you look good so don't be afraid to spread some of that around.

Reprimand

Things don't always go as planned and everyone makes a mistakes. However, your employee has a right to know that you recognize when he is not living up to his part of the bargain. Use the the reprimand as a way to get the employee back on track.

1. Make sure to reprimand the worker immediately. The yearly evaluation is too late. Be specific and don't get personal. As a manager, you are concerned with non-productive behaviors. Make sure that you explain how the behavior makes you feel.
2. Get your employee used to the idea that bad behavior yields a reprimand.
3. Allow yourself to encourage correct behavior by praising examples of past good behavior. This is sometimes tough because you will be angry, but it's important to reinforce the pattern that good behavior receives praise, while bad behavior receives a reprimand.
4. The reprimand is the punishment, so don't start a cold war. When the reprimand is over, don't hold it against the employee. Give him a chance to prove himself.

You should reprimand less than you praise; otherwise, it will lose its impact on your employees. Remember, a reprimand is supposed to guide bad behavior back to good behavior. Be firm, but gentle. Assume once you've given a reprimand that the problem is over–unless the employee proves you wrong. An employee will respond positively to your confidence.

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Active Listening

We tend not to value listening because it seems so ordinary and easy. *Everybody knows how to listen,* or so we think. But that is not really true.

Active listening is doing two things that managers often forget:

- listening to understand how the speaker feels
- listening to find out about the situation

It is important to listen with the proper frame of mind. Do you allow yourself to argue silently with the speaker, or discount a person because their conversation style annoys you? Try to see the situation from the speaker's point of view.

Below are some of the principles of good active listening:

Be alert and attentive

Try not to let your mind wander. It takes concentration to listen. Use your body--your posture, your eyes, your hands, your face--to show you are really listening.

Clear your mind of barriers

If you are in conversation with someone you dislike, there is a strong tendency to react by not listening to her. In some situations, you may be too ready to blame other people in the hospital; in others you may want to rush to the defense of your co-workers. Monitor your own reactions and guard against becoming defensive or critical.

Don't be put off by emotional words or ideas.

Strong emotions can be frightening, and they can block problem solving. If you let people express their emotions, then you can erase the block and get down to business.

An employee may want a problem solved, but he may also want to express his frustration. If you try to ignore his emotions, he feels like his needs are not being met. He may keep trying to get you to acknowledge his frustration instead of moving to a solution. Even if you manage to solve his problem, he may go away unsatisfied because he feels like you did not really listen.

Don't assume

It's easy to assume that you know the answer to a question before the employee gets it out of her mouth. After all, you've heard it all a million times. But this is a sure way to get into trouble. Don't assume you know what someone wants--listen for new information.

If you are not sure you understand, ask questions to clarify. When you think you do understand, paraphrase what the other person is saying and watch for her confirmation.

Observe yourself next time you listen to someone. Are you being active, or do you need some practice?

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Body Language

Some of the most important communication takes place without words– through your body language. Using open body language, nodding your head or saying "uh-huh," reassures the speaker that you are listening. Closed body language, like folding your arms or looking at the clock, can make the speaker feel shut out.

Here's a list of body cues. Think about which ones you use.

Open

1. Facing the speaker instead of sitting at an angle.
2. Leaning toward the speaker.
3. Smiling or showing the appropriate expression.
4. Mirroring the speaker's body language.
5. Maintaining a comfortable body posture.
6. Nodding your head.
7. Keeping the right distance between you and the speaker; 3-4 feet for interviewing.
8. Animated facial expression.
9. Making eye contact.
10. Touching the speaker, if appropriate.

Closed

1. Being poker-faced or showing no facial expressions.
2. Leaning away from the speaker .
3. Avoiding eye contact; looking around the room.
4. Being too close or too far away from the speaker.
5. Folding your arms as if to shut out the speaker.
6. Tapping a pen or pencil.
7. Looking at forms, writing or engaging in any other activity while the speaker is talking.
8. Looking at your watch.

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Coping with Criticism

The problem with criticism, whether it comes from an employee or a boss, is that hits us so close to where we live: in our egos. We have spent a lifetime creating an image for ourselves; when someone criticizes, they are often telling us that we are not being perceived the way we want to be. So criticism can hurt. But that doesn't mean we can't cope with it as managers.

Criticism is often one of two things:

- a sign that someone needs some attention or reassurance
- good information that can make you better at what you do

The trick is sorting the complaint from the information. Being an active listener during even the most severe critiques will give the critic the attention he needs and give you information you might need as a manager.

Generally when someone is criticizing you or the hospital he is making broad statements that are only partially true (if at all). Your tendency may be to try and prove why he are wrong or to justify your actions. This only adds fuel to his fire. Instead, try directing the discussion with one of the following techniques.

Ask for Specifics

Blanket statements, like "You're being unfair," are hard to answer. You are better off inviting the speaker to be more specific, to focus on what is really troubling her. Then you can start solving that problem.

Patient: The care in this hospital is terrible.

Nurse: Can you tell me how it is terrible?

Patient: My room wasn't properly cleaned yesterday and the nurse was in too big a hurry.

The problem still deserves prompt attention, but it isn't overwhelming any more. Concrete problems can be fixed.

Your attitude is very important here. You have to be open to finding out what is wrong. You may be the one who has to apologize or change behaviors. If you aren't willing to listen, then don't ask.

Staff member: You're being unfair.

Supervisor: What do I do that is unfair?

Staff member: You assigned Barbara a day off even though it wasn't her turn.

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The supervisor can be defensive or assert her authority or maybe admit that she made a mistake. Either way, this problem is easier to respond to than broad criticism.

Paraphrase the Speaker's Ideas

Paraphrasing invites the speaker to talk, to get it off his chest and to discuss the problem. It also ends up giving you good information.

Patient: I can't believe the way you run this hospital. I'll never come here again, even if my life depends on it.

Nursing Assistant: You sound upset. Can you tell me the problem?

Patient: It's not my problem--it's yours. I've buzzed six times and no one answers my call. This is a hell of a way to run a hospital

Nursing Assistant: Ah, I can see why you're upset. You've been trying to get a nurse to help you.

Ask for Additional Complaints

If you ask for additional complaints in a genuinely caring way, the speaker will feel your concern. Suddenly the two of you are working together; you're not enemies.

Examples:

Are there any other ways we could improve our service?

Is there anything else that bothers you?

Is there anything else I should do when I give directions?

Agree with the Speaker

Using this response makes people nervous at first. They're afraid that it means they have to agree when people say bad things about the MMC. Or they are concerned that admitting fault will make the hospital liable.

The secret is to pay attention to what you agree to. You probably don't want to agree if the patient says: *This is the worst hospital I've ever been to.* You can agree with the idea behind it: *It's frustrating when you feel like you're not getting proper care.*

Sometimes you can honestly agree with the whole statement.

Examples:

I suppose I was being defensive.

I guess you're right--my behavior was out of line.

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Coping with Criticism Exercise

Look at the different types of answers are possible for the following example.

Criticism: *Sometimes I think you don't take me seriously. It seems like everything I say goes in one ear and out the other.*

Responses

1. **Ask for specifics:** I'd understand what you mean better if you would give me some example of when I seem to be ignoring you.

2. **Paraphrase:** It sounds like you're mad at me because you think I'm just humoring you sometimes so you'll stop talking. Is that it?

3. **Ask for more complaints:** Is it just my not taking you seriously that's upsetting you, or is there something else too?

4. **Agree with the speaker:** Well, I suppose you're right. Sometimes I don't pay attention to what you say, mostly when I'm tired or mad.

Exercise 1

Directions: Supply an appropriate phrase for each type of response.

Criticism: *I want to complain about favoritism in this department. Ever since Charles starting working here, you've been ignoring the rest of us..*

Responses

1. Ask for specifics:

2. Paraphrase:

3. Ask for more complaints:

4. Agree with the speaker:

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Exercise 2

Directions: Supply an appropriate response to each criticism using each type of technique. All techniques might not feel comfortable for all examples, but try.

a. Ask for specifics:

b. Paraphrase:

c. Ask for more complaints:

d. Agree with the speaker

Criticisms

Hispanics employees get treated like dirt around here. If I were an Anglo, I wouldn't get evaluated so hard.

I'm always being asked to translate for patients. How do you expect me to get all of my work done if I'm being interrupted every hour to help someone do their work?

Why can't I ever get a day off when I want it? Elva always gets her way, but you never give me mine.

Why can't you be more helpful? You haven't answered a single one of my questions.

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Confronting

The word confrontation makes people uncomfortable, but confrontation merely means dealing with a problem assertively. There are times when it is necessary to be assertive about a problem with a manager or an employee. This is a perfectly legitimate decision, if nothing else that you have tried has helped and if you are sure of your motives.

When you confront, your attitude is crucial. A confrontation is not a dramatic scene where you point a shaking finger at your rival and yell: *You have done me wrong!* Save that for the movies. The purpose of confronting someone is to acknowledge that there seems to be a problem and that you would like to work with that person to come to a mutually satisfying solution. Here are some ideas that will help you confront constructively.

Identify the real problem

This is the moment where you take one last look at the situation. Is it really a problem you need to discuss or are you trying to make other people responsible for your own problems?

Identify your motives

Be sure you are confronting to improve the situation and not just because you are in the mood to be right. Confrontation is frightening both to the person confronted and the one who is confronting. Be honest about why you are confronting someone.

Describe the problem situation

Your goal is to have the person in a receptive frame of mind so the problem can be solved. Avoid accusing the other person or telling her that the situation is her problem. "I" language can be really helpful here: *I am concerned that...*

Describing the behavior that is problematic is less threatening then making personal comments. A person's behavior is something that can be changed more easily and hence is less threatening to talk about.

Also try to be tentative in your approach. It is less threatening to say: *It seems like there is a problem here.* Instead of: *There is a **big** problem here.* Tentativeness can give the other person an out. She can say: *I misunderstood.* If your purpose is to solve the problem, instead of feeding the need to always be right, then it doesn't matter what she says.

Being specific is helpful. Avoid saying: *Ysou aren't doing things right.* Try: *I'm not sure these forms were filed correctly.* It gives the two of

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you something specific to work on. Specific problems also will seem less overwhelming then big general ones.

Be sensitive to the other person's needs

Being confronted is embarrassing; try to be sensitive to the other person's embarrassment. Choose when and how you confront someone carefully and then do it privately. Try for a "win-win" solution.

Confronting can change the relationship

Facing someone with a problem can be a good experience for a relationship. It can help the two of you communicate better in the future. It can also hurt the relationship if the confrontation is too harsh or too threatening for the other person to hear.

Be open to change

It generally takes two people to create a problem. Say you are angry because Nurse Dominguez snaps at you all the time. You snapped back a couple of times. Now the two of you barely speak to each other.

You've decided to confront her because it is affecting the way you work together. In the midst of the conversation, you discover that she is short with you because she doesn't like your attitude. This is a turning point in the conversation. You can answer with: *Yeah, but you were rude to me first!* This will kill the conversation.

Alternatively, you might say: *I didn't realize there was a problem. Can you tell me what specifically you don't like about my attitude?* You may discover it is something trivial like you don't say good morning when you see her (you'd be amazed at how many people complain about that!). Or it may be more serious. To solve the problem, you both have to be willing to change. You may have to start saying good morning even if you haven't had your coffee yet. She may have to be more courteous to you.

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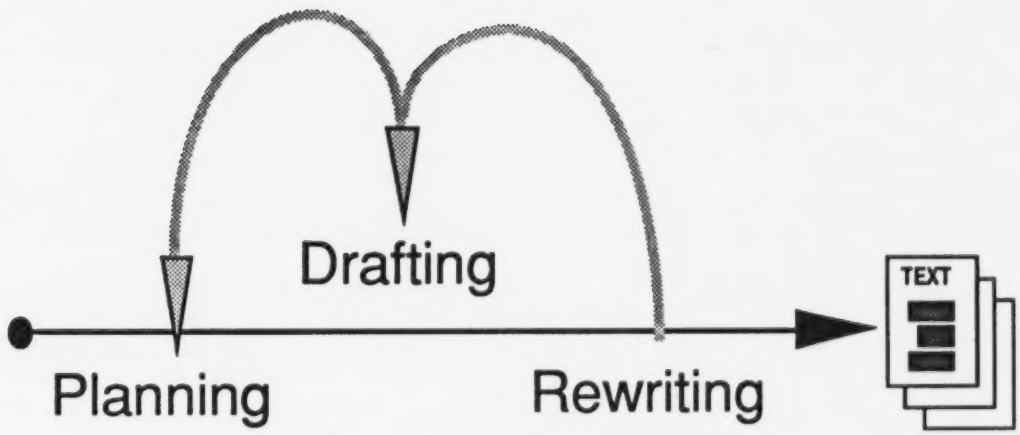
The Writing Process



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Purpose and Audience Worksheet

Use these questions to get a clearer picture of your audience and your goals for communicating.

Purpose:

- Why am I communicating?
- What do I want my audience to do?

Audience:

- Who is my audience?
- What does my audience know and how does my audience feel about this subject?
- How will my audience use this document?
- What is my audience's style? Should I adjust to it?

Cut to the chase:

- If my audience were to forget everything else, what one key point do I want remembered?

Strategy:

- Should I discuss this now or later? Should I write or call? How about talking over lunch or after work?
- Should I include deadlines and list any requested actions?
- Am I too late or is someone else communicating this same information?

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Drafting Strategies

1. You might start by putting your outline on paper or on a computer screen with space left between the entries proportional to the amount of text you think each entry will require. Then try grafting your text onto the outline. The outline provides the skeleton for fleshing out your text; so when you get blocked in one section, the outline can serve as a reminder of other sections to work on.
2. For shorter documents, try to get your whole draft done in one sitting, as quickly as you can. For longer documents, see if you can complete a whole section at one sitting. Remind yourself that you're not after perfection, but a quick first draft.
3. Start writing the part that you feel you know the best. There's no obligation to start at the beginning; in fact, the introduction is often the *last* thing you should write. After all, how do you know what you're going to say until you've said it?
4. If you are writing in one section and get an inspiration for another section, quickly jump to that section, write yourself a brief note (I surround mine with square brackets so I can easily search for them later), and then jump back to where you left off.
5. Force yourself to keep going forward, not backward. This is hard, but if you can kick that editing demon off your shoulder while you draft, you may be able to keep up with the composing voice that dictates what to write. (It tends to shut up when the editing demon takes over.) You'll be surprised by how much you have to say about your topic.
6. When you get blocked (and we all do sometimes), try jumping to another section and begin drafting there. (Remember those bracketed notes you left for yourself?) If that doesn't help, go back to the top of your document and read down through what you've already written. That often gets the creative juices flowing again.
7. If you're still blocked, you might seek out a colleague and tell him or her what you're trying write. You will often talk through the block, and find yourself saying *exactly* what you want to write. It's often a good idea to bring a tape recorder to these sessions to capture your words.
8. If you are still blocked, put the project aside and work on something else. Your mind is perfectly capable of working on the back burner to solve a problem while working on another project at a conscious level. Ideas for the blocked project will come as it simmers on the back burner of your mind.

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Revising and Editing Checklist

Revising

- ❒ Is my purpose clearly stated?
- ❒ Is the tone right for my intended audience?
- ❒ Have I included the right amount of detail for the level of understanding I want my audience to have?
- ❒ Is the most important point at the top of the document, or is it strategically placed?
- ❒ Do I request any specific action?
- ❒ Is the overall document organized logically?
- ❒ Does the text flow smoothly from section to section?
- ❒ Is the text visually appealing? Is it inviting, or does it look forbidding?
- ❒ Do I make good use of figures and tables to support my main points?

Editing

- ❒ Have I written complete sentences (not fragments or run-ons)?
- ❒ Do my subjects and verbs agree?
- ❒ Am I using active voice? Do I make it clear *who* is doing *what* to *whom*?
- ❒ Am I consistent in the use of tense, number, person?
- ❒ Have I used correct spelling and punctuation?

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Reviewing The Writing of Others

Being able to review someone else's writing is one of the most important skills a writer can develop. One of the quickest ways to learn about writing is to help others, because that forces us to be readers and writers at the same time. You can use these strategies on your own writing, too. Just change hats as you talk to yourself.

Read:

- Read the document once straight through. Don't mark up the writing; just read as if you were a real reader. Stay in touch with how you feel, where you get confused, where you stumble on sentences.
- Read it a second time, this time making notes or checking areas you think need more work.
- Read it out loud if you really want to hear how it sounds.

Check the revision worksheet:

- Is the purpose clear?
- Does the writer establish connections with the audience?
- Are there enough details?
- Is the document focused and visually attractive?

Feedback:

- Praise two or three specific areas of the document. Don't just say, "This is nice." Go the distance: "This paragraph told me exactly what I needed to know at this point," or "This sentence tells me exactly what I ought to do."
- Use positive language. For example, refer to sections that still need revision as areas to improve, not as problems.
- Try to phrase comments with "I" statements and avoid "you" statements. "I needed more evidence here," instead of, "You really lost me on this one."
- Ask the writer to paraphrase or restate unclear passages. Use questions like "Could this section be stated in another way?"
- Be kind and use your imagination. Remember, you're on the writer's side. Your behavior will convince her of that.

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Make sure the writer leaves with a sense of purpose:

- Recap the positive and restate the areas that need improvement.
- Allow the writer plenty of time to ask questions and clear up any confusion.
- If it is appropriate, both writer and critic should set a deadline for the next round of revisions.

When the shoe is on the other foot:

- Don't be defensive; listen to the feedback.
- Don't start explaining: "What I meant to say was . . . ." or "The reason I did it that way was . . . ." Don't bother arguing. Just say "Thanks," or "OK, I understand."
- Ask all the questions you can about the document. It is not unusual to discover solutions to writing problems by talking about them.

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Quick Writing Tips

Sometimes you have to complete a piece of writing immediately. When speed is the problem, organization is the solution. On this page you will find three methods that can help you write under pressure. Remember that the reader should always leave your memo or short report knowing what to do.

The Inverted Pyramid

This journalistic method works for many people. The trick is to list what needs to be communicated and then order it according to importance. Informed readers can then scan the document from top to bottom for the information they don't already have, while less informed readers can read the entire document.

- List the information you must cover from most important to least important. Eliminate all unnecessary information.
- Start writing the most important information and work your way down the list
- Keep your paragraphs and sentences short and snappy.
- Insert headings where needed.
- Proofread.

The Question Outline

People who do quick research often rely on this method to shape their notes into simple reports. All you have to do is write a paragraph or two in answer to each question. But be careful, since this doesn't work for every piece of writing you do. In the right situation, it can cut writing time considerably.

- Write the answers to the questions that apply to your task: Who? What? When? How? Why? So What?
- Shuffle the paragraphs into whatever order you feels makes the most sense.
- Add any necessary transition sentences.
- Keep your paragraphs and sentences short and snappy.
- Insert headings where needed.
- Proofread.

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Three stage outline

This is one of the easiest ways to avoid the chronological or "then-this-happened-and-then-this-happened-and-then-that-happened" trap. It is sometimes tempting to communicate the entire history of an incident and neglect to organize the information to help your reader. This method can help you avoid that habit.

- Start the document by stating the problem. Label the section, "Problem" or "Problem Description."
- Spend a paragraph or two catching the reader up on background information. Label the section "Background."
- Suggest a solution or notify the reader of the action you have already taken. Label the section "Recommended Action" or "Action Taken."
- Keep your paragraphs and sentences short and snappy.
- Insert headings where needed.

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Communicating in Health Care Settings

Certainly, the content of communication is important in health care. To some extent, good communication relies on accurate information, competent explanations, and clear directions. But more important to good communication are the relationships that are established as we talk with each other. We don't just pass ideas back and forth. We work to build and maintain relationships with other people. How we say things continually contributes--in either negative or positive ways--to the relationships that we build through our words.

Let's consider here some of the facts of hospital life that make communication difficult. As you read, try to think of situations in your particular work situation that you are reminded of. Take the time to make short notes (in the margin or elsewhere) that either support or contradict the points made in this discussion.

Hospitals are tense places.

We should never lose sight of the fact that hospitals produce tension and anxiety in those who work there. Illness is present, as is death. Dangerous chemicals and equipment are present. People must constantly make important decisions about what to do and how to do it. Risk, exposure, and liability color conversations. Everyone knows that good intentions are not sufficient to protect oneself from lawsuits or self-doubt. These aspects of the hospital setting mean we must be careful about what we write or say. Emotions must be guarded and words carefully measured. Uncertainty must sometimes be hidden, and language must always be used carefully.

Nor should we lose sight of what hospitals do to those who arrive for treatment. Patients made anxious by disease are made uncomfortable by unfamiliar surroundings. People who are accustomed to being in control must surrender control to a large group of unknown specialists. Patients are stressed by being in the hospital, weakened by disease, disoriented by drugs and treatments. Patients know medical treatment is expensive and that insurance companies are reluctant to pay the full costs. So patients are threatened not only in their health but in their finances.

What happens to communication under such stress? People lose their tempers, they become demanding, and they take out their frustrations on others. They become impatient and uncooperative. Tension and anxiety influence what people are able to hear and how they interpret what they do hear. The hospital setting is not normal and we can't expect people to communicate in normal ways.

Hospitals are busy places.

Hospitals feel busy--crowded lobbies and waiting rooms, people moving around quickly, paper everywhere, equipment and patients being rolled about. People who work in hospitals feel busy--too many patients to take care of, too many

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interruptions, too little time to deliver quality attention to patients and to the demands of the job.

Good communication takes time. You need to feel the other person is listening to what you have to say. You need to feel that both of you are relaxed enough to attend to each other. If someone is trying to tell you something, but you have a dozen other concerns on your mind, how can you really listen? Maybe you try to talk with someone, but you sense that person is really too busy to listen to you. Perhaps the person looks at her watch or shuffles through papers or taps a pencil on the desk. All such cues of body language say "Hurry up--I don't have time to listen to your problems." Instead of communicating and building a working relationship, you end up feel ignored or mistreated.

It is frustrating to realize that someone is not concentrating on what you are saying. But it is typical in situations where everybody feels busy.

Everybody gives orders.

The hospital is a very task-oriented workplace. Much needs to get done and there are many levels of jobs and supervision to make sure the jobs get done. "Do this" and "Do that," "Get me this" and "Take care of that." All day long, people are giving orders to other people, telling others to do something. And often, the orders are delivered with urgency. It is not just "Do something" but "Do it now!" *Stat*, we say, insistently, in the language of emergencies.

In busy situations with lots of people giving orders, communication may not follow normal rules of politeness. It is common for hospital workers to complain about being bossed around by everyone else. Frequently, workers feel that they are not treated politely and with respect. Part of this is the result of the urgency that characterizes hospitals--there is much to be done and it must be done now. So people may skip saying "Please" or they may be too blunt or too demanding in the ways they use language. They use fewer words, more commands, and a more blunt approach.

We are all sensitive to how we are being treated by others. We are tuned into the little communication signals that convey respect and that demonstrate a good working relationship. When someone else doesn't convey the politeness or respect we feel we deserve, we become offended and perhaps uncooperative. These feelings are normal--they are extremely common in health care settings.

Hospitals are characterized by status, rank, and authority

Think about the levels of authority or status in a hospital workplace. Suppose you tried to draw a diagram of all the supervisors, coordinators, and managers. Suppose you tried to include all the patterns of authority--who gives orders and who receives orders. It would be a complicated diagram.

Hospitals are characterized by a very wide range of status. At one end of the status hierarchy are the doctors. There is probably no job in our society with higher status than that of physician. They have more education and training, and they tend to

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make more money that others. They are not even real hospital employees; rather, we say they have staff privileges.

At the other end of the status scale are those who keep the hospital running--maintenance and housekeeping, cafeteria and laundry. Many levels of wages and education are represented in the hospital staff--from people who have not finished high school to those who have spent practically their whole lives in advanced schooling.

In a normal day at a hospital, people representing a wide range of status are in constant contact. Where else would you find so many different specializations communicating with each other everyday at work? If you worked in a department store, you wouldn't have all these people of different education, status, and training running around. Status differences are highlighted in health care organizations because so many people of unequal status interact daily.

Our language training and the manners we learn at home and at school tell us to respect status. The rules say to be especially polite, to show respect, as we go up the status hierarchy. In the health care setting, the staff constantly must adjust speech to the wide status hierarchy. This puts a strain on communication, both when status is respected and when it is not. It's a strain, too, because we are taught to observe rules that tell us to speak one way to those above us and another way to those below us. In other words, status forces us to keep creating relationships that are not equal. Our language continually forces us to recognize inequalities in who we are, where we come from, and what we do.

The hospital reflects social divisions of gender, race, language, and social standing.

Does the word *doctor* make you think of a man? Does the word *nurse* make you think of a woman? What about *nursing assistant*, or *records clerk*? What about *manager, cafeteria worker, secretary, vice president*, or *security officer*? The divisions of gender--of the roles that we expect men and women to play--are especially striking in hospitals. As you look around the hospital, are there clear tendencies for women to be in certain positions and men to be in other positions? Who manages? Who cooks and serves the food?

When workplaces are biased along gender lines, it tends to stress communication. Health care has always been a field that employs a large number of women. And like other workplaces, it tends to reflect the bias of keeping women in lower status, less well paying positions.

When we consider how gender differences affect communication, we need to think about how people are brought up--how they are socialized to behave as men and women. Those who study gender differences suggest that men tend to be independent, they tend to view conversations as arguments, and they tend to dominate conversations and control topics. Women, in contrast, tend to be more sensitive to relationships. Women value intimacy more than men, and they place more emphasis on how people are feeling and reacting as they communicate. Women may assume that the point of a conversation is to explore solutions to a

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problem; men may assume that conversation is a way of fighting and a matter of winning.

In addition to large percentages of women workers, health care settings tend to have large numbers of hispanics and blacks, especially in the lower paying jobs. The workplace reflects the inequities in the larger society.

In the case of hispanic workers, the difficulties of communicating across cultural groups is intensified because of language boundaries. Languages in contact--for example, the use of English and Spanish in the same workplace--tend to make some people feel included and others feel excluded on the basis of language. People feel left out of conversations and sometimes feel they are purposely excluded. English-only speakers feel that bilingual workers shouldn't use Spanish because it makes them feel left out. Spanish speakers may feel most comfortable using their home language, especially when relaxing over lunch or at break.

Those who are bilingual often feel that English-only speakers don't like or respect Spanish, even though they often need it. Bilingual speakers--from housekeeping or patient care--are often called upon to translate for Spanish-speaking patients. The translators often feel burdened by the need to translate. It disrupts their work and is really not considered part of their job duties. They feel used, because they happen to be bilingual.

The mix of gender, language, ethnicity, and social class will continue to characterize the health care workforce. We will see fewer white men entering the workforce and increasing numbers of women and minorities. These changes will continue to put stress on working relationships and communication. We need to find ways to improve communication across language and cultural groups, and we need to find ways to remove bias and discrimination from the workplace.

The hospital is a high tech workplace.

Hospitals are an information-intensive environment where technological change occurs at a dizzying pace. Hospital workers are constantly having to learn how to use new equipment and how to follow new procedures. To meet the challenge of this evolving workplace, workers need to be adaptable, which means that they need to have sophisticated reading, writing and oral communication skills.

The hospital is a bureaucracy.

The word bureaucracy suggests a complicated organization. Hospitals are bureaucracies--complicated workplaces with many levels of workers, complex reporting relationships, and conflicting purposes.

Bureaucracies threaten good communication. People lose track of who is responsible for what. It becomes difficult to say who has authority for something or how to initiate a change. People become insecure about their identities within the organization. There are too many offices, too many procedures, too much paperwork. Everything seems to detract from one's ability to do a good job.

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Hospital staff often feel they are left out of decisions or that they are not informed about what is going on. Within their own groups, they may feel their managers don't share information or that they do not meet frequently enough on a department level. Some staffers complain that they learn what's going on in the newspaper. Others say that no one pays attention to their complaints of suggestions. These are characteristic feelings in a bureaucracy. People feel unimportant, uninformed, or unappreciated.

In a bureaucracy, grapevines tend to flourish. People learn about changes to procedures, or job postings, or reorganizations through co-workers. The grapevine tends to be unreliable, both in terms of the accuracy of information and the consistency with which people learn. Grapevines can't be eliminated, especially in large organizations. Smart bureaucracies take advantage of the grapevine to spread accurate and timely information.

The hospital offers care but must make a profit.

When hospitals were community-based, charitable organizations, they could afford to concentrate solely on quality care. Now, however, hospitals must meet conflicting expectations. They must try to balance the demands of quality care with the need to make a profit. They must continue to serve the indigent public and to live within the "reasonable and customary" charges as determined by insurance companies and federal programs.

Many of those who work in hospitals have values that conflict with profit motives. Many choose health care as a profession because of strong desires to help others through quality care. They see contradictions in health care because hospitals are businesses as well as health care providers. Hospitals are characterized by tough ethical dilemmas that must balance competing purposes. Who deserves treatment? Who receives the use of what equipment? When do we send patients home? What can we do for those who are poor or uninsured? What is a "reasonable and customary charge" for care that is changing constantly and that is always delivered to individuals with their own needs?

What can we conclude about communication in health care settings?

We can conclude that communication in health care setting is difficult. The hospital is an unusual place and the language, too, is unusual.

You will be frustrated and disappointed if you expect people to observe normal rules of polite conversation. Too much is at stake in the hospital setting. You can be careful to distinguish the language that people use when they are in a hurry or under pressure from language that is truly intended to be rude. You can train yourself to be slow to take offense and quick to grant others some leeway because you understand the pressures of working in a hospital.

If you pay attention to language, you can see it as something interesting and challenging. Watch how people behave with language. Notice how people observe status distinctions or cross-cultural communication. Pay attention to how people communicate not just with their words but with their bodies. The hospital is a very

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rich language environment. Think of it as a laboratory where you can observe and learn about human behavior.

Above all, remember that we are all creating and sustaining relationships as we talk with each other. Most of us want to be respected, appreciated, and liked by others. We want to contribute as part of a team. We share goals for quality care and we normally share good intentions toward each other. Language is one of the means we use to create a comfortable, productive working community. We should pay attention to how we use language and how to use it better.

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Communication Can Be Difficult

Communication in a health care setting can be difficult, as you just read. We want you to spend some time thinking about communication difficulties that you experience.

What sorts of things that make communication difficult where you work?

What sorts of things do you think you and others can do to make communication better?

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Why listening's not as easy as it sounds

Everyone knows good managers are good listeners. So why is it that you tune out at times?

"Even a teeny complaint has a half-life of about 50 years for the person receiving it."

By Nancy K. Austin

I AM about to give a speech to the top 300 managers of a celebrated service company. The executives get together like this at least once a year and look forward to hearing great news: Market share is growing impressively, customers love us, our future is so bright we have to wear shades.

Only this year the story is different. A just-published independent survey of several thousand customers has revealed that the competition is doing it better. On top of that, the whole of the U.S. economy is decidedly southward-bound. This is where I come in: They have asked me to help them return to basics, to tell them what I know about treating customers right.

Just before I go on, they show videotape clips from some interviews they did with a cluster of supervisory employees, a kind of visual attitude survey. Hallelujah, I cheer, they *are* willing to listen—that's one of the basics they have down already. I am impressed by their grit; usually listening is the first thing to go—along with training meetings like this one—when hard times come.

The room darkens and the tape rolls. The first two smiling faces up on the screen keep it short and sweet. The third—what is this? The image has been *scrambled*, even the voice, so that it sounds for all the world like the talking subway trains in the Atlanta airport. Man or woman, impossible to tell. This is pure *Donahue*, as when drug dealers or ax murderers or Mafia informants appear identityless. Instantly, I am paying strict attention, tensing along with everybody else, bracing as for a shock. "Well," says the singsong digitized voice, as little tiles of color move around the screen, "once I called headquarters and had to leave a message, and the receptionist never gave it to the right person."

That's it. That's all we hear from he/she/it. The next subject has something nice to say; her animated face is projected without electronic body armor. All together, seven clips are shown, three of them "Donahued." The houselights come up and I am introduced and give my speech, but those refashioned tapes bother me. What kind of message is management sending when even minor criticisms are treated so gingerly?

After a while a plain but trustworthy explanation occurs to me. Making room for opinions other than our own is heroic work. Everyone knows that even a teeny complaint has a half-life of about 50 years for the person on the receiving end. (So *that's* why it takes so long to get over performance appraisals.) Compliments, according to a similar law of physics, vaporize in 30 seconds flat. Yes, listening is extremely troublesome.

When you say, "You can tell me anything," you make a few promises: "I will listen; I will keep my mind open; I do not take criticism personally; I know your intentions are good." All the same, how well I understand Joan Didion's stark assertion that there is no such thing as "constructive criticism." All criticism is violent.

That must be the reason certain grievances that have come my way over the years still make me crazy. Once, after giving what I thought was a perfectly good speech, a note, folded into eighths, was damply pressed into my hand by a woman from the audience on her way out. "Do something about your hair!" it read. "Look at Jane Pauley; if you wore your hair like hers, it would be a huge improvement." "But what about the speech?" I whined to myself. "Did you even hear the speech?" And that is the eternal burden the loyal listener carries: You may not like what you hear, not one bit.

Listening well is an art form, and we are not talking still lifes. There are certainly more than enough experts on the subject these days. They know that you know that listening is important. But they think you should tune in as never before now that times are tough—and *they* can help you do that. They suggest a brushup on what they call "active listening" (better than the ordinary kind).

There are, you may remember, three main steps: First, indicate that you are really, really paying attention by asking open questions ("In what ways, exactly, Ms. Fernwhistle, do you feel I've been a jerk?"). Next, conduct a few reality checks along the way ("If I understand you correctly, you're saying I'm a sorry excuse for a manager?"). Finally, don't let your mind drift off in the middle, perhaps because you are busy planning your next witty retort ("Oh yeah?").

Although you could rush off to the library now and find at least 74 books to guide you in this noble endeavor, I hope to save you some gasoline and a modicum of trouble by offering my own friendly counsel. (I can tell you anything, right?)

LISTEN BY WANDERING AROUND

Begin with your own staff. When you want to know what's on their minds, give them a break and go to them; listening works better when done

in *their* territory. Keep it casual and realize that you will have to make roving listening a habit before anybody truly believes you are serious about it: Consistency is what counts.

When you do go forth to listen, arrive empty-handed, for heaven's sake. Leave your notebook and your Mont Blanc and all other scary armaments behind. This is no fact-finding mission. Think of it as Outward Bound. The point, skilled listeners will confirm, is to build solid relationships and two-way trust, which are all you really need to gain a foothold on just about any corporate wall.

Suppose, however, that in the course of your adventures somebody courageously suggests a nifty idea that you want to remember. Ask that intrepid being if you might borrow *her* pen and notepad, and write her suggestion down then and there.

FIGHT THE URGE TO "SET THE RECORD STRAIGHT"

My erstwhile banker taught me this when I—a client of 12 years—politely announced that I was taking my business elsewhere. What pushed me over the edge was a new bank policy that limited to three the number of questions a customer could ask over the telephone. Apparently we were getting in the way of production efficiencies or something.

The banker's response to my change of heart was swift and disturbing. "Speaking as your financial engineer," he began (big trouble, I knew it), "I think I can solve this problem. We simply need to do a better job of *educating* you." Oh yeah?

He meant that I was making a big mistake, that if I properly understood all the marvelous things the bank had done for me lately, I would realize how ill-conceived my decision actually was. He never asked the important questions, like why I wanted out or what the place might do to improve or how to win my business back. In every bone I knew he could not catch what I was saying. The bank didn't want to listen—and neither did he.

REALLY LISTEN

You will be forgiven almost every misstep but one. A listener must be all there. No sidelong glances, squirming or signs that you are being driven to distraction. If you feel your attention start to go, try asking a couple of new questions, lean in toward the speaker or take the discussion for a short walk. When those fail to deliver the goods, better to admit defeat and pick it up again later. Come to think of it, fessing up to your flawed attention span might turn out better than you imagine: Your staff will realize you are, after all, human. And keep trying—even if at first you don't succeed. The good news is you don't need to fret about getting it exactly right; most people, it seems, respond well to an unpretentious but genuine attempt to walk a mile in their moccasins. As you learn to listen, people will get better at telling you things.

Sometimes distance or delicacy makes it impossible to lend your own ear. Consider calling on an objective aide-de-camp (someone everyone knows and trusts, not a consultant or a moonlighting snoop). I've seen personnel managers successfully deputized for this purpose. What people cannot or will not say to you, for whatever reason, they might share with another respected elder. Other options: Inaugurate a weekly listening breakfast or dream up a suggestion-of-the-week award.

There ought to be a surgeon general's stamp on this subject. Warning: Listening can make you feel defensive and hostile toward the one you're listening to.

BE AN EQUAL OPPORTUNITY LISTENER

Some managers lend their ears only to those who occupy higher salary brackets. There are words to describe this tendency, but "listening" isn't one of them. Beware of underestimating talent merely because it doesn't own a pin-striped suit. That fresh-faced accounting clerk you hired yesterday has as much (or more) to offer as the honchos do, but it is a rare manager who tunes in so democratically.

DO SOMETHING ABOUT WHAT YOU HEAR

It's tough enough to buckle down and listen—it's even harder to act on the information you get. But customers and employees alike will continue to suggest improvements only if their ideas are taken seriously, even those you may privately consider undercooked. When a staff member dares to suggest a better way, the courteous—the smart—thing to do is respond fast, say, within 24 hours. Delay and you confirm everyone's worst fears: This is a paper tiger, no teeth; why bother?

So scribble a quick thank-you note. Send a message via e-mail; small acknowledgments carry weight, too. Whatever you do, remember that a sincere, speedy response is what counts.

KNOW WHEN TO CALL IT A DAY

The tricky part is knowing when to stop tuning in and start dropping out. After a short presentation, I asked if anyone had questions, a familiar procedure. A nice-looking man jumped up, brandished a copy of my book, *A Passion for Excellence*, and sniped, "Explain, if you can, how the second paragraph on page 263 of your book squares with what you have just told us" (gotcha!). I let a couple of seconds pass before I replied, without a hint of sarcasm, "I would be happy to, if you would please tell me whether you're talking about the hardback or paperback edition—because, you understand, the pages don't correspond." The applause and laughter made it unnecessary to say more.

Mr. Smartypants wanted to make a statement, of course, and he was less than congenial about it. In assertiveness-training classes they call that a hit-and-run—an appropriate term, I always thought. It took some effort, but I managed to overcome my instant defensiveness (the really hard part) long enough to listen and respond (active listening again).

At the end of the day, listening to people is not so much a matter of studied style as a mark of leadership. Leaders pay attention. Leaders are willing to authorize people to think, and they make that clear by listening. Listening says, You are smart and have important things to say; you are worth my time, go ahead; what a good idea.

Listening is not complex enough for many executives (so they don't do it). In fact, there really ought to be a surgeon general's warning affixed to this subject:

WARNING: THIS ONLY LOOKS EASY.
LISTENING CAN MAKE YOU
FEEL DEFENSIVE AND HOSTILE TOWARD
THE ONE YOU'RE LISTENING TO.

Any way you look at it, "plain-vanilla listening" is anything but. ■

NANCY K. AUSTIN is a Capitola, California–based management consultant. Clients of her company, Nancy Austin, Inc., include American Express, IBM and MCI. She is co-author, with Tom Peters, of A Passion for Excellence *(Warner Books).*

How to run a meeting

Antony Jay

At critical points things may go wrong, but here are ways of putting them right

Why is it that any single meeting may be a waste of time, an irritant, or a barrier to the achievement of an organization's objectives? The answer lies in the fact, as the author says, that "all sorts of human crosscurrents can sweep the discussion off course, and errors of psychology and technique on the chairman's part can defeat its purposes." This article offers guidelines on how to right things that go wrong in meetings. The discussion covers the functions of a meeting, the distinctions in size and type of meetings, ways to define the objectives, making preparations, the chairman's role, and ways to conduct a meeting that will achieve its objectives.

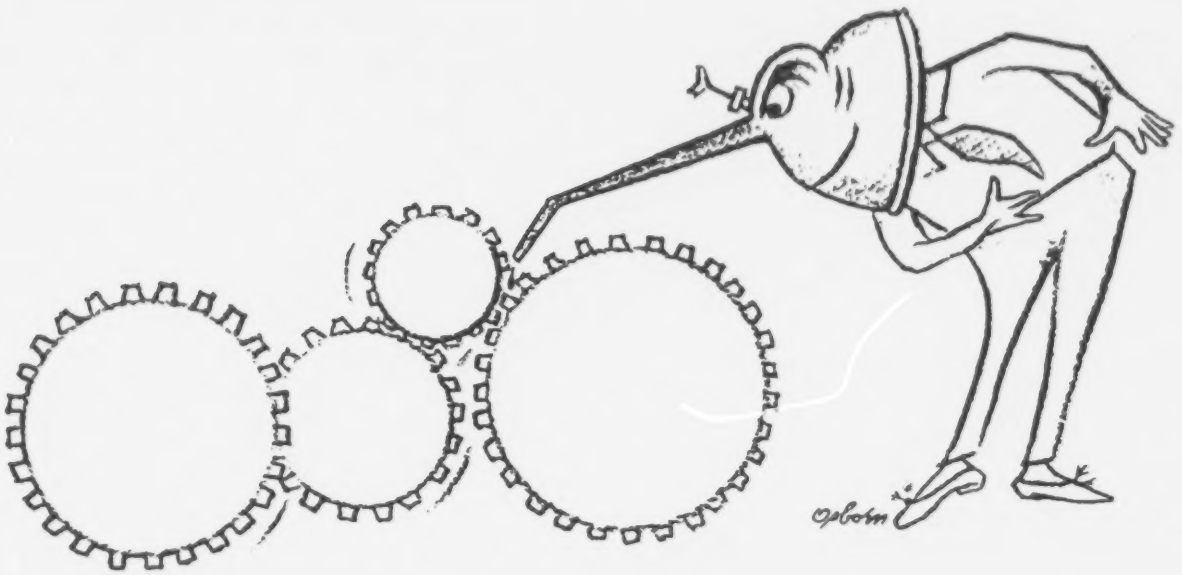
Mr. Jay is chairman of Video Arts Ltd., a London-based producer of training films for industry. Currently, the company is producing a film (featuring John Cleese of Monty Python) on the subject of meetings, and this article springs from the research Mr. Jay did for that project. He has also written many TV documentaries, such as *Royal Family*, and authored several books, including *Management and Machiavelli* (Holt, Rinehart & Winston, 1968).

Drawings by Robert Osborn.

Why have a meeting anyway? Why indeed? A great many important matters are quite satisfactorily conducted by a single individual who consults nobody. A great many more are resolved by a letter, a memo, a phone call, or a simple conversation between two people. Sometimes five minutes spent with six people separately is more effective and productive than a half-hour meeting with them all together.

Certainly a great many meetings waste a great deal of everyone's time and seem to be held for historical rather than practical reasons; many long-established committees are little more than memorials to dead problems. It would probably save no end of managerial time if every committee had to discuss its own dissolution once a year, and put up a case if it felt it should continue for another twelve months. If this requirement did nothing else, it would at least refocus the minds of the committee members on their purposes and objectives.

But having said that, and granting that "referring the matter to a committee" can be a device for diluting authority, diffusing responsibility, and delaying decisions, I cannot deny that meetings fulfill a deep human need. Man is a social species. In every organization and every human culture of which we have record, people come together in small groups at regular and frequent intervals, and in larger "tribal" gatherings from time to time. If there are no meetings in the places where they work, people's attachment to the organizations they work for will be small, and they will meet in regular formal or



informal gatherings in associations, societies, teams, clubs, or pubs when work is over.

This need for meetings is clearly something more positive than just a legacy from our primitive hunting past. From time to time, some technomaniac or other comes up with a vision of the executive who never leaves his home, who controls his whole operation from an all-electronic, multichannel, microwave, fiber-optic video display dream console in his living room. But any manager who has ever had to make an organization work greets this vision with a smile that soon stretches into a yawn.

There is a world of science fiction, and a world of human reality; and those who live in the world of human reality know that it is held together by face-to-face meetings. A meeting still performs functions that will never be taken over by telephones, teleprinters, Xerox copiers, tape recorders, television monitors, or any other technological instruments of the information revolution.

Functions of a meeting

At this point, it may help us understand the meaning of meetings if we look at the six main functions that meetings will always perform better than any of the more recent communication devices:

1
In the simplest and most basic way, a meeting defines the team, the group, or the unit. Those present belong to it; those absent do not. Everyone is able to look around and perceive the whole group and sense the collective identity of which he or she forms a part. We all know who we are—whether we are on the board of Universal International, in the overseas sales department of Flexitube, Inc., a member of the school management committee, on the East Hampton football team, or in Section No. 2 of Platoon 4, Company B.

2
A meeting is the place where the group revises, updates, and adds to what it knows *as a group*. Every group creates its own pool of shared knowledge, experience, judgment, and folklore. But the pool consists only of what the individuals have experienced or discussed as a group—i.e., those things which every individual knows that all the others know, too. This pool not only helps all members to do their jobs more intelligently, but it also greatly increases the speed and efficiency of all communications among them. The group knows that all special nuances and wider implications in a brief statement will be immediately clear to its members. An enormous amount of material can be left unsaid that would have to be made explicit to an outsider.

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But this pool needs constant refreshing and replenishing, and occasionally the removal of impurities. So the simple business of exchanging information and ideas that members have acquired separately or in smaller groups since the last meeting is an important contribution to the strength of the group. By questioning and commenting on new contributions, the group performs an important "digestive" process that extracts what's valuable and discards the rest.

Some ethologists call this capacity to share knowledge and experience among a group "the social mind," conceiving it as a single mind dispersed among a number of skulls. They recognize that this "social mind" has a special creative power, too. A group of people meeting together can often produce better ideas, plans, and decisions than can a single individual, or a number of individuals, each working alone. The meeting can of course also produce worse outputs or none at all, if it is a bad meeting.

However, when the combined experience, knowledge, judgment, authority, and imagination of a half dozen people are brought to bear on issues, a great many plans and decisions are improved and sometimes transformed. The original idea that one person might have come up with singly is tested, amplified, refined, and shaped by argument and discussion (which often acts on people as some sort of chemical stimulant to better performance), until it satisfies far more requirements and overcomes many more objections than it could in its original form.

3
A meeting helps every individual understand both the collective aim of the group and the way in which his own and everyone else's work can contribute to the group's success.

4
A meeting creates in all present a commitment to the decisions it makes and the objectives it pursues. Once something has been decided, even if you originally argued against it, your membership in the group entails an obligation to accept the decision. The alternative is to leave the group, but in practice this is very rarely a dilemma of significance. Real opposition to decisions within organizations usually consists of one part disagreement with the decision to nine parts resentment at not being consulted before the decision. For most people on most issues, it is enough to know that their views were heard and considered. They may regret that they were not followed, but they accept the outcome.

And just as the decision of any team is binding on all the members, so the decisions of a meeting of people higher up in an organization carry a greater authority than any decision by a single executive. It is much harder to challenge a decision of the board than of the chief executive acting on his own. The decision-making authority of a meeting is of special importance for long-term policies and procedures.

5
In the world of management, a meeting is very often the only occasion where the team or group actually exists and works as a group, and the only time when the supervisor, manager, or executive is actually perceived as the leader of the team, rather than as the official to whom individuals report. In some jobs the leader does guide his team through his personal presence—not just the leader of a pit gang or construction team, but also the chef in the hotel kitchen and the maître d'hôtel in the restaurant, or the supervisor in a department store. But in large administrative headquarters, the daily or weekly meeting is often the only time when the leader is ever perceived to be guiding a team rather than doing a job.

6
A meeting is a status arena. It is no good to pretend that people are not or should not be concerned with their status relative to the other members in a group. It is just another part of human nature that we have to live with. It is a not insignificant fact that the word *order* means (a) hierarchy or pecking order; (b) an instruction or command; and (c) stability and the way things ought to be, as in "put your affairs in order," or "law and order." All three definitions are aspects of the same idea, which is indivisible.

Since a meeting is so often the only time when members get the chance to find out their relative standing, the "arena" function is inevitable. When a group is new, has a new leader, or is composed of people like department heads who are in competition for promotion and who do not work in a single team outside the meeting, "arena behavior" is likely to figure more largely, even to the point of dominating the proceedings. However, it will hardly signify with a long-established group that meets regularly.

Despite the fact that a meeting can perform all of the foregoing main functions, there is no guarantee that it will do so in any given situation. It is all too possible that any single meeting may be a waste of

time, an irritant, or a barrier to the achievement of the organization's objectives.

What sort of meeting?

While my purpose in this article is to show the critical points at which most meetings go wrong, and to indicate ways of putting them right, I must first draw some important distinctions in the size and type of meetings that we are dealing with.

Meetings can be graded by *size* into three broad categories: (1) the assembly—100 or more people who are expected to do little more than listen to the main speaker or speakers; (2) the council—40 or 50 people who are basically there to listen to the main speaker or speakers but who can come in with questions or comments and who may be asked to contribute something on their own account; and (3) the committee—up to 10 (or at the most 12) people, all of whom more or less speak on an equal footing under the guidance and control of a chairman.

We are concerned in this article only with the "committee" meeting, though it may be described as a committee, a subcommittee, a study group, a project team, a working party, a board, or by any of dozens of other titles. It is by far the most common meeting all over the world, and can perhaps be traced back to the primitive hunting band through which our species evolved. Beyond doubt it constitutes the bulk of the 11 million meetings that—so it has been calculated—take place every day in the United States.

Apart from the distinction of size, there are certain considerations regarding the *type* of meeting that profoundly affect its nature. For instance:

Frequency—A daily meeting is different from a weekly one, and a weekly meeting from a monthly one. Irregular, ad hoc, quarterly, and annual meetings are different again. On the whole, the frequency of meetings defines—or perhaps even determines—the degree of unity of the group.

Composition—Do the members work together on the same project, such as the nursing and ancillary staff on the same ward of a hospital? Do they work on different but parallel tasks, like a meeting of the

company's plant managers or regional sales managers? Or are they a diverse group—strangers to each other, perhaps—united only by the meeting itself and by a common interest in realizing its objectives?

Motivation—Do the members have a common objective in their work, like a football team? Or do they to some extent have a competitive working relationship, like managers of subsidiary companies at a meeting with the chief executive, or the heads of research, production, and marketing discussing finance allocation for the coming year? Or does the desire for success through the meeting itself unify them, like a neighborhood action group or a new product design committee?

Decision process—How does the meeting group ultimately reach its decisions? By a general consensus, "the feeling of the meeting"? By a majority vote? Or are the decisions left entirely to the chairman himself, after he has listened to the facts, opinions, and discussions?

Kinds of meetings

The experienced meeting-goer will recognize that, although there seem to be five quite different methods of analyzing a meeting, in practice there is a tendency for certain kinds of meetings to sort themselves out into one of three categories. Consider:

The *daily meeting*, where people work together on the same project with a common objective and reach decisions informally by general agreement.

The *weekly* or *monthly meeting*, where members work on different but parallel projects and where there is a certain competitive element and a greater likelihood that the chairman will make the final decision himself.

The *irregular, occasional*, or *"special project" meeting*, composed of people whose normal work does not bring them into contact and whose work has little or no relationship to the others'. They are united only by the project the meeting exists to promote and motivated by the desire that the project should succeed. Though actual voting is uncommon, every member effectively has a veto.

Of these three kinds of meeting, it is the first—the workface type—that is probably the most common. It is also, oddly enough, the one most likely to be successful. Operational imperatives usually ensure that it is brief, and the participants' experience of working side by side ensures that communication is good.

The other two types are a different matter. In these meetings all sorts of human crosscurrents can sweep the discussion off course, and errors of psychology and technique on the chairman's part can defeat its purposes. Moreover, these meetings are likely to bring together the more senior people and to produce decisions that profoundly affect the efficiency, prosperity, and even survival of the whole organization. It is, therefore, toward these higher-level meetings that the lessons of this article are primarily directed.

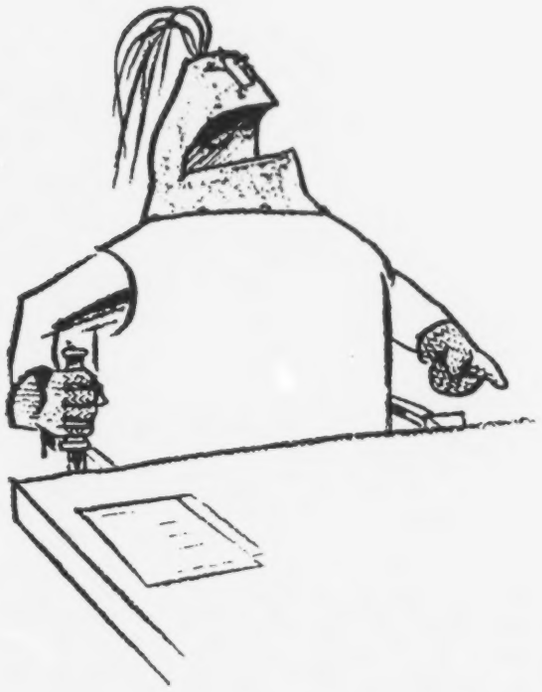
Before the meeting

The most important question you should ask is: "What is this meeting intended to achieve?" You can ask it in different ways—"What would be the likely consequences of not holding it?" "When it is over, how shall I judge whether it was a success or a failure?"—but unless you have a very clear requirement from the meeting, there is a grave danger that it will be a waste of everyone's time.

Defining the objective

You have already looked at the six main functions that all meetings perform, but if you are trying to use a meeting to achieve definite objectives, there are in practice only certain types of objectives it can really achieve. Every item on the agenda can be placed in one of the following four categories, or divided up into sections that fall into one or more of them:

1
Informative-digestive—Obviously, it is a waste of time for the meeting to give out purely factual information that would be better circulated in a document. But if the information should be heard from a particular person, or if it needs some clarification and comment to make sense of it, or if it has deep implications for the members of the meeting, then it is perfectly proper to introduce an item onto the agenda that requires no conclusion, decision, or



action from the meeting; it is enough, simply, that the meeting should receive and discuss a report.

The "informative-digestive" function includes progress reports—to keep the group up to date on the current status of projects it is responsible for or that affect its deliberations—and review of completed projects in order to come to a collective judgment and to see what can be learned from them for the next time.

2
Constructive-originative—This "What shall we do?" function embraces all items that require something new to be devised, such as a new policy, a new strategy, a new sales target, a new product, a new marketing plan, a new procedure, and so forth. This sort of discussion asks people to contribute their knowledge, experience, judgment, and ideas. Obviously, the plan will probably be inadequate unless all relevant parties are present and pitching in.

3
Executive responsibilities—This is the "How shall we do it?" function, which comes after it has been decided what the members are going to do; at this point, executive responsibilities for the different components of the task have to be distributed around the table. Whereas in the second function the contributors' importance is their knowledge and ideas, here their contribution is the responsibility for implementing the plan. The fact that they and their subordinates are affected by it makes their contribution especially significant.

It is of course possible to allocate these executive responsibilities without a meeting, by separate individual briefings, but several considerations often make a meeting desirable:

First, it enables the members as a group to find the best way of achieving the objectives.

Second, it enables each member to understand and influence the way in which his own job fits in with the jobs of the others and with the collective task.

Third, if the meeting is discussing the implementation of a decision taken at a higher level, securing the group's consent may be of prime importance. If so, the fact that the group has the opportunity to formulate the detailed action plan itself may be the decisive factor in securing its agreement, because in that case the final decision belongs, as it were, to the group. Everyone is committed to what the group decides and is collectively responsible for the final shape of the project, as well as individually answerable for his own part in it. Ideally, this sort of agenda item starts with a policy, and ends with an action plan.

4
Legislative framework: Above and around all considerations of "What to do" and "How to do it," there is a framework—a departmental or divisional organization—and a system of rules, routines, and procedures within and through which all the activity takes place. Changing this framework and introducing a new organization or new procedures can be deeply disturbing to committee members and a threat to their status and long-term security. Yet leaving it unchanged can stop the organization from adapting to a changing world. At whatever level this change happens, it must have the support of all the perceived leaders whose groups are affected by it.

The key leaders for this legislative function must collectively make or confirm the decision; if there is any important dissent, it is very dangerous to close the discussion and make the decision by decree. The group leaders cannot expect quick decisions if they are seeking to change the organization framework and routines that people have grown up with. Thus they must be prepared to leave these

items unresolved for further discussion and consultation. As Francis Bacon put it—and it has never been put better—"Counsels to which time hath not been called, time will not ratify."

Making preparations

The four different functions just discussed may of course be performed by a single meeting, as the group proceeds through the agenda. Consequently, it may be a useful exercise for the chairman to go through the agenda, writing beside each item which function it is intended to fulfill. This exercise helps clarify what is expected from the discussion and helps focus on which people to bring in and what questions to ask them.

People
The value and success of a committe meeting are seriously threatened if too many people are present. Between 4 and 7 is generally ideal, 10 is tolerable, and 12 is the outside limit. So the chairman should do everything he can to keep numbers down, consistent with the need to invite everyone with an important contribution to make.

The leader may have to leave out people who expect to come or who have always come. For this job he may need tact; but since people generally preserve a fiction that they are overworked already and dislike serving on committees, it is not usually hard to secure their consent to stay away.

If the leader sees no way of getting the meeting down to a manageable size, he can try the following devices: (a) analyze the agenda to see whether everyone has to be present for every item (he may be able to structure the agenda so that some people can leave at half time and others can arrive); (b) ask himself whether he doesn't really need two separate, smaller meetings rather than one big one; and (c) determine whether one or two groups can be asked to thrash some of the topics out in advance so that only one of them needs to come in with its proposals.

Remember, too, that a few words with a member on the day before a meeting can increase the value of the meeting itself, either by ensuring that an important point is raised that comes better from the floor than from the chair or by preventing a time-wasting discussion of a subject that need not be touched on at all.

Papers
The agenda is by far the most important piece of paper. Properly drawn up, it has a power of speeding and clarifying a meeting that very few people understand or harness. The main fault is to make it unnecessarily brief and vague. For example, the phrase "development budget" tells nobody very much, whereas the longer explanation "To discuss the proposal for reduction of the 1976–1977 development budget now that the introduction of our new product has been postponed" helps all committee members to form some views or even just to look up facts and figures in advance.

Thus the leader should not be afraid of a long agenda, provided that the length is the result of his analyzing and defining each item more closely, rather than of his adding more items than the meeting can reasonably consider in the time allowed. He should try to include, very briefly, some indication of the reason for each topic to be discussed. If one item is of special interest to the group, it is often a good idea to single it out for special mention in a covering note.

The leader should also bear in mind the useful device of heading each item "For information," "For discussion," or "For decision" so that those at the meeting know where they are trying to get to.

And finally, the chairman should not circulate the agenda too far in advance, since the less organized members will forget it or lose it. Two or three days is about right—unless the supporting papers are voluminous.

Other 'paper' considerations: The order of items on the agenda is important. Some aspects are obvious—the items that need urgent decision have to come before those that can wait till next time. Equally, the leader does not discuss the budget for the reequipment program before discussing whether to put the reequipment off until next year. But some aspects are not so obvious. Consider:

□
The early part of a meeting tends to be more lively and creative than the end of it, so if an item needs mental energy, bright ideas, and clear heads, it may be better to put it high up on the list. Equally, if there is one item of great interest and concern to everyone, it may be a good idea to hold it back for a while and get some other useful work done first. Then the star item can be introduced to carry the meeting over the attention lag that sets in after the first 15 to 20 minutes of the meeting.

□
Some items unite the meeting in a common front while others divide the members one from another. The leader may want to start with unity before entering into division, or he may prefer the other way around. The point is to be aware of the choice and to make it consciously, because it is apt to make a difference to the whole atmosphere of the meeting. It is almost always a good idea to find a unifying item with which to end the meeting.

□
A common fault is to dwell too long on trivial but urgent items, to the exclusion of subjects of fundamental importance whose significance is long-term rather than immediate. This can be remedied by putting on the agenda the time at which discussion of the important long-term issue will begin—and by sticking to it.

□
Very few business meetings achieve anything of value after two hours, and an hour and a half is enough time to allocate for most purposes.

□
It is often a good idea to put the finishing time of a meeting on the agenda as well as the starting time.

□
If meetings have a tendency to go on too long, the chairman should arrange to start them one hour before lunch or one hour before the end of work. Generally, items that ought to be kept brief can be introduced ten minutes from a fixed end point.

□
The practice of circulating background or proposal papers along with the minutes is, in principle, a good one. It not only saves time, but it also helps in formulating useful questions and considerations in advance. But the whole idea is sabotaged once the papers get too long; they should be brief or provide a short summary. If they are circulated, obviously the chairman has to read them, or at least must not be caught not having read them.

(One chairman, more noted for his cunning than his conscientiousness, is said to have spent 30 seconds before each meeting going through all the papers he had not read with a thick red pen, marking lines and question marks in the margins at random, and making sure these were accidentally made visible to the meeting while the subject was being discussed.)

□
If papers are produced at the meeting for discussion, they should obviously be brief and simple, since everyone has to read them. It is a supreme folly to bring a group of people together to read six pages of closely printed sheets to themselves. The exception is certain kinds of financial and statistical papers whose function is to support and illustrate verbal points as reference documents rather than to be swallowed whole: these are often better tabled at the meeting.

□
All items should be thought of and thought about in advance if they are to be usefully discussed. Listing "Any other business" on the agenda is an invitation to waste time. This does not absolutely preclude the chairman's announcing an extra agenda item at a meeting if something really urgent and unforeseen crops up or is suggested to him by a member, provided it is fairly simple and straightforward. Nor does it preclude his leaving time for general unstructured discussion after the close of the meeting.

□
The chairman, in going through the agenda items in advance, can usefully insert his own brief notes of points he wants to be sure are not omitted from

the discussion. A brief marginal scribble of "How much notice?" or "Standby arrangements?" or whatever is all that is necessary.

The chairman's job

Let's say that you have just been appointed chairman of the committee. You tell everyone that it is a bore or a chore. You also tell them that you have been appointed "for my sins." But the point is that you tell them. There is no getting away from it: some sort of honor or glory attaches to the chairman's role. Almost everyone is in some way pleased and proud to be made chairman of something. And that is three quarters of the trouble.

Master or servant?

Their appointment as committee chairman takes people in different ways. Some seize the opportunity to impose their will on a group that they see themselves licensed to dominate. Their chairmanship is a harangue, interspersed with demands for group agreement.

Others are more like scoutmasters, for whom the collective activity of the group is satisfaction enough, with no need for achievement. Their chairmanship is more like the endless stoking and fueling of a campfire that is not cooking anything.

And there are the insecure or lazy chairmen who look to the meeting for reassurance and support in their ineffectiveness and inactivity, so that they can spread the responsibility for their indecisiveness among the whole group. They seize on every expression of disagreement or doubt as a justification for avoiding decision or action.

But even the large majority who do not go to those extremes still feel a certain pleasurable tumescence of the ego when they take their place at the head of the table for the first time. The feeling is no sin: the sin is to indulge it or to assume that the pleasure is shared by the other members of the meeting.

It is the chairman's self-indulgence that is the greatest single barrier to the success of a meeting. His first duty, then, is to be aware of the temptation and

of the dangers of yielding to it. The clearest of the danger signals is hearing himself talking a lot during a discussion.

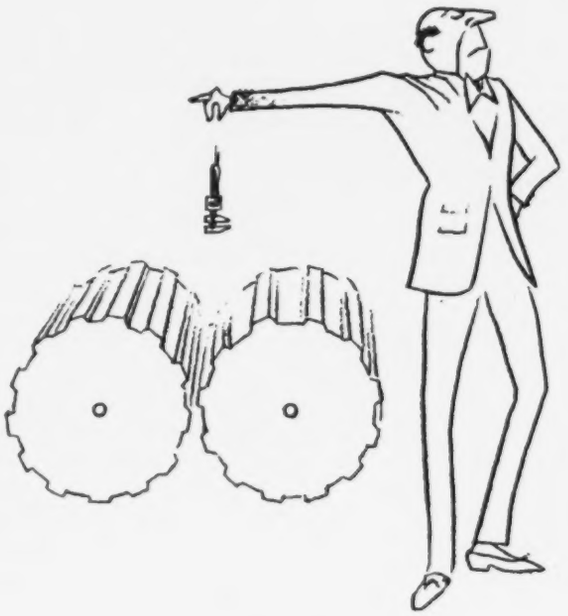
One of the best chairmen I have ever served under makes it a rule to restrict her interventions to a single sentence, or at most two. She forbids herself ever to contribute a paragraph to a meeting she is chairing. It is a harsh rule, but you would be hard put to find a regular attender of her meetings (or anyone else's) who thought it was a bad one.

There is, in fact, only one legitimate source of pleasure in chairmanship, and that is pleasure in the achievements of the meeting—and to be legitimate, it must be shared by all those present. Meetings are *necessary* for all sorts of basic and primitive human reasons, but they are *useful* only if they are seen by all present to be getting somewhere—and somewhere they know they could not have gotten to individually.

If the chairman is to make sure that the meeting achieves valuable objectives, he will be more effective seeing himself as the servant of the group rather than as its master. His role then becomes that of assisting the group toward the best conclusion or decision in the most efficient manner possible: to interpret and clarify; to move the discussion forward; and to bring it to a resolution that everyone understands and accepts as being the will of the meeting, even if the individuals do not necessarily agree with it.

His true source of authority with the members is the strength of his perceived commitment to their combined objective and his skill and efficiency in helping and guiding them to its achievement. Control and discipline then become not the act of imposing his will on the group but of imposing the group's will on any individual who is in danger of diverting or delaying the progress of the discussion and so from realizing the objective.

Once the members realize that the leader is impelled by his commitment to their common objective, it does not take great force of personality for him to control the meeting. Indeed, a sense of urgency and a clear desire to reach the best conclusion as quickly as possible are a much more effective disciplinary instrument than a big gavel. The effective chairman can then hold the discussion to the point by indicating that there is no time to pursue a particular idea now, that there is no time for long speeches, that the group has to get through



this item and on to the next one, rather than by resorting to pulling rank.

There are many polite ways the chairman can indicate a slight impatience even when someone else is speaking—by leaning forward, fixing his eyes on the speaker, tensing his muscles, raising his eyebrows, or nodding briefly to show the point is taken. And when replying or commenting, the chairman can indicate by the speed, brevity, and finality of his intonation that "we have to move on." Conversely, he can reward the sort of contribution he is seeking by the opposite expressions and intonations, showing that there is plenty of time for that sort of idea, and encouraging the speaker to develop the point.

After a few meetings, all present readily understand this nonverbal language of chairmanship. It is the chairman's chief instrument of educating the group into the general type of "meeting behavior" that he is looking for. He is still the servant of the group, but like a hired mountain guide, he is the one who knows the destination, the route, the weather signs, and the time the journey will take. So if he suggests that the members walk a bit faster, they take his advice.

This role of servant rather than master is often obscured in large organizations by the fact that

the chairman is frequently the line manager of the members: this does not, however, change the reality of the role of chairman. The point is easier to see in, say, a neighborhood action group. The question in that case is, simply, "Through which person's chairmanship do we collectively have the best chance of getting the children's playground built?"

However, one special problem is posed by this definition of the chairman's role, and it has an extremely interesting answer. The question is: How can the chairman combine his role with the role of a member advocating one side of an argument?

The answer comes from some interesting studies by researchers who sat in on hundreds of meetings to find out how they work. Their consensus finding is that most of the effective discussions have, in fact, two leaders: one they call a "team," or "social," leader; the other a "task," or "project," leader.

Regardless of whether leadership is in fact a single or a dual function, for our purposes it is enough to say that the chairman's best role is that of social leader. If he wants a particular point to be strongly advocated, he ensures that it is someone else who leads off the task discussion, and he holds back until much later in the argument. He might indeed change or modify his view through hearing the discussion, but even if he does not it is much easier for him to show support for someone else's point later in the discussion, after listening to the arguments. Then, he can summarize in favor of the one he prefers.

The task advocate might regularly be the chairman's second-in-command, or a different person might advocate for different items on the agenda. On some subjects, the chairman might well be the task advocate himself, especially if they do not involve conflict within the group. The important point is that the chairman has to keep his "social leadership" even if it means sacrificing his "task leadership." However, if the designated task advocate persists in championing a cause through two or three meetings, he risks building up quite a head of antagonism to him among the other members. Even so, this antagonism harms the group less by being directed at the "task leader" than at the "social leader."

Structure of discussion

It may seem that there is no right way or wrong way to structure a committee meeting discussion. A subject is raised, people say what they think, and finally a decision is reached, or the discussion is terminated. There is some truth in this. Moreover, it would be a mistake to try and tie every discussion of every item down to a single immutable format.

Nevertheless, there is a logical order to a group discussion, and while there can be reasons for not following it, there is no justification for not being aware of it. In practice, very few discussions are inhibited, and many are expedited, by a conscious adherence to the following stages, which follow exactly the same pattern as a visit to the doctor:

"What seems to be the trouble?" The reason for an item being on a meeting agenda is usually like the symptom we go to the doctor with: "I keep getting this pain in my back" is analogous to "Sales have risen in Germany but fallen in France." In both cases it is clear that something is wrong and that something ought to be done to put it right. But until the visit to the doctor, or the meeting of the European marketing committee, that is about all we really know.

"How long has this been going on?" The doctor will start with a case history of all the relevant background facts, and so will the committee discussion. A solid basis of shared and agreed-on facts is the best foundation to build any decision on, and a set of pertinent questions will help establish it. For example, when did French sales start to fall off? Have German sales risen exceptionally? Has France had delivery problems, or less sales effort, or weaker advertising? Have we lost market share, or are our competitors' sales falling too? If the answers to all these questions, and more, are not established at the start, a lot of discussion may be wasted later.

"Would you just lie down on the couch?" The doctor will then conduct a physical examination to find out how the patient is now. The committee, too, will want to know how things stand at this moment. Is action being taken? Do long-term orders show the same trend? What are the latest figures? What is the current stock position? How much money is left in the advertising budget?

"You seem to have slipped a disc." When the facts are established, you can move toward a dignosis. A doctor may seem to do this quickly, but that is the result of experience and practice. He is, in fact, rapidly eliminating all the impossible or far-fetched explanations until he leaves himself with a short list. The committee, too, will hazard and eliminate a

variety of diagnoses until it homes in on the most probable—for example, the company's recent energetic and highly successful advertising campaign in Germany plus new packaging by the market leader in France.

"*Take this round to the druggist.*" Again, the doctor is likely to take a shortcut that a committee meeting may be wise to avoid. The doctor comes out with a single prescription, and the committee, too, may agree quickly on a single course of action.

But if the course is not so clear, it is better to take this step in two stages: (a) construct a series of options—do not, at first, reject any suggestions outright but try to select and combine the promising elements from all of them until a number of thought-out, coherent, and sensible suggestions are on the table; and (b) only when you have generated these options do you start to choose among them. Then you can discuss and decide whether to pick the course based on repackaging and point-of-sale promotion, or the one based on advertising and a price cut, or the one that bides its time and saves the money for heavier new-product promotion next year.

If the item is at all complex or especially significant, it is important for the chairman not only to have the proposed course of the discussion in his own head, but also to announce it so that everyone knows. A good idea is to write the headings on an easel pad with a felt pen. This saves much of the time wasting and confusion that result when people raise items in the wrong place because they were not privy to the chairman's secret that the right place was coming up later on in the discussion.

Conducting the meeting

Just as the driver of a car has two tasks, to follow his route and to manage his vehicle, so the chairman's job can be divided into two corresponding tasks, dealing with the subject and dealing with the people.

Dealing with the subject

The essence of this task is to follow the structure of discussion as just described in the previous section. This, in turn, entails listening carefully and keeping the meeting pointed toward the objective.

At the start of the discussion of any item, the chairman should make it clear where the meeting should try to get to by the end. Are the members hoping to make a clear decision or firm recommendation? Is it a preliminary deliberation to give the members something to go away with and think about? Are they looking for a variety of different lines to be pursued outside the meeting? Do they have to approve the proposal, or merely note it?

The chairman may give them a choice: "If we can agree on a course of action, that's fine. If not, we'll have to set up a working party to report and recommend before next month's meeting."

The chairman should make sure that all the members understand the issue and why they are discussing it. Often it will be obvious, or else they may have been through it before. If not, then he or someone he has briefed before the meeting should give a short introduction, with some indication of the reason the item is on the agenda; the story so far; the present position; what needs to be established, resolved, or proposed; and some indication of lines of inquiry or courses of action that have been

suggested or explored, as well as arguments on both sides of the issue.

If the discussion is at all likely to be long or complex, the chairman should propose to the meeting a structure for it with headings (written up if necessary), as I stated at the end of the section on "Structure of discussion." He should listen carefully in case people jump too far ahead (e.g., start proposing a course of action before the meeting has agreed on the cause of the trouble), or go back over old ground, or start repeating points that have been made earlier. He has to head discussion off sterile or irrelevant areas very quickly (e.g., the rights and wrongs of past decisions that it is too late to change, or distant prospects that are too remote to affect present actions).

It is the chairman's responsibility to prevent misunderstanding and confusion. If he does not follow an argument or understand a reference, he should seek clarification from the speaker. If he thinks two people are using the same word with different meanings, he should intervene (e.g., one member using *promotion* to mean point-of-sale advertising only, and another also including media publicity).

He may also have to clarify by asking people for facts or experience that perhaps influence their view but are not known to others in the meeting. And he should be on the lookout for points where an interim summary would be helpful. This device frequently takes only a few seconds, and acts like a life belt to some of the members who are getting out of their depth.

Sometimes a meeting will have to discuss a draft document. If there are faults in it, the members should agree on what the faults are and the chairman should delegate someone to produce a new draft later. The group should never try to redraft around the table.

Perhaps one of the most common faults of chairmanship is the failure to terminate the discussion early enough. Sometimes chairmen do not realize that the meeting has effectively reached an agreement, and consequently they let the discussion go on for another few minutes, getting nowhere at all. Even more often, they are not quick enough to close a discussion *before* agreement has been reached.

A discussion should be closed once it has become clear that (a) more facts are required before further progress can be made, (b) discussion has revealed that the meeting needs the views of people not present, (c) members need more time to think about the subject and perhaps discuss it with colleagues, (d) events are changing and likely to alter or clarify the basis of the decision quite soon, (e) there is not going to be enough time at this meeting to go over the subject properly, or (f) it is becoming clear that two or three of the members can settle this outside the meeting without taking up the time of the rest. The fact that the decision is difficult, likely to be disputed, or going to be unwelcome to somebody, however, is not a reason for postponement.

At the end of the discussion of each agenda item, the chairman should give a brief and clear summary of what has been agreed on. This can act as the dictation of the actual minutes. It serves not merely to put the item on record, but also to help people realize that something worthwhile has been achieved. It also answers the question "Where did all that get us?" If the summary involves action by a member of the meeting, he should be asked to confirm his acceptance of the undertaking.

Dealing with the people

There is only one way to ensure that a meeting starts on time, and that is to start it on time. Latecomers who find that the meeting has begun without them soon learn the lesson. The alternative is that the prompt and punctual members will soon realize that a meeting never starts until ten minutes after the advertised time, and they will also learn the lesson.

Punctuality at future meetings can be wonderfully reinforced by the practice of listing late arrivals (and early departures) in the minutes. Its ostensible and perfectly proper purpose is to call the latecomer's attention to the fact that he was absent when a decision was reached. Its side effect, however, is to tell everyone on the circulation list that he was late, and people do not want that sort of information about themselves published too frequently.

There is a growing volume of work on the significance of seating positions and their effect on group behavior and relationships. Not all the findings are generally agreed on. What does seem true is that:

□
Having members sit face to face across a table facilitates opposition, conflict, and disagreement, though of course it does not turn allies into enemies. But

it does suggest that the chairman should think about whom he seats opposite himself.

□

Sitting side by side makes disagreements and confrontation harder. This in turn suggests that the chairman can exploit the friendship-value of the seats next to him.

□

There is a "dead man's corner" on the chairman's right, especially if a number of people are seated in line along from him (it does not apply if he is alone at the head of the table).

□

As a general rule, proximity to the chairman is a sign of honor and favor. This is most marked when he is at the head of a long, narrow table. The greater the distance, the lower the rank—just as the lower-status positions were "below the salt" at medieval refectories.

Control the garrulous

In most meetings someone takes a long time to say very little. As chairman, your sense of urgency should help indicate to him the need for brevity. You can also suggest that if he is going to take a long time it might be better for him to write a paper. If it is urgent to stop him in full flight, there is a useful device of picking on a phrase (it really doesn't matter what phrase) as he utters it as an excuse for cutting in and offering it to someone else: "Inevitable decline—that's very interesting. George, do you agree that the decline is inevitable?"

Draw out the silent

In any properly run meeting, as simple arithmetic will show, most of the people will be silent most of the time. Silence can indicate general agreement, or no important contribution to make, or the need to wait and hear more before saying anything, or too good a lunch, and none of these need worry you. But there are two kinds of silence you must break:

1

The silence of diffidence. Someone may have a valuable contribution to make but be sufficiently nervous about its possible reception to keep it to himself. It is important that when you draw out such a contribution, you should express interest and pleasure (though not necessarily agreement) to encourage further contributions of that sort.

2

The silence of hostility. This is not hostility to ideas, but to you as the chairman, to the meeting, and to the process by which decisions are being reached. This sort of total detachment from the whole proceedings is usually the symptom of some feeling of affront. If you probe it, you will usually find that there is something bursting to come out, and that it is better out than in.

Protect the weak

Junior members of the meeting may provoke the disagreement of their seniors, which is perfectly reasonable. But if the disagreement escalates to the point of suggesting that they have no right to contribute, the meeting is weakened. So you may have to take pains to commend their contribution for its usefulness, as a pre-emptive measure. You can reinforce this action by taking a written note of a point they make (always a plus for a member of a meeting) and by referring to it again later in the discussion (a double-plus).

Encourage the clash of ideas

But, at the same time, discourage the clash of personalities. A good meeting is not a series of dialogues between individual members and the chairman. Instead, it is a crossflow of discussion and debate, with the chairman occasionally guiding, mediating, probing, stimulating, and summarizing, but mostly letting the others thrash ideas out. However, the meeting must be a contention of *ideas*, not people.

If two people are starting to get heated, widen the discussion by asking a question of a neutral member of the meeting, preferably a question that requires a purely factual answer.

Watch out for the suggestion-squashing reflex

Students of meetings have reduced everything that can be said into questions, answers, positive reactions, and negative reactions. Questions can only seek, and answers only supply, three types of response: information, opinion, and suggestion.

In almost every modern organization, it is the suggestions that contain the seeds of future success. Although very few suggestions will ever lead to anything, almost all of them need to be given every chance. The trouble is that suggestions are much easier to ridicule than facts or opinions. If people feel that making a suggestion will provoke the negative reaction of being laughed at or squashed, they will soon stop. And if there is any status-jostling going on at the meeting, it is all too easy to use the occasion of someone's making a suggestion as the opportunity to take him down a peg. It is all too easy and a formula to ensure sterile meetings.

The answer is for you to take special notice and show special warmth when anyone makes a suggestion, and to discourage as sharply as you can the squashing-reflex. This can often be achieved by requiring the squasher to produce a better suggestion on the spot. Few suggestions can stand up to squashing in their pristine state: your reflex must be to pick out the best part of one and get the other committee members to help build it into something that might work.

Come to the most senior people last
Obviously, this cannot be a rule, but once someone of high authority has pronounced on a topic, the less senior members are likely to be inhibited. If you work up the pecking order instead of down it, you are apt to get a wider spread of views and ideas. But the juniors who start it off should only be asked for contributions within their personal experience and competence. ("Peter, you were at the Frankfurt Exhibition—what reactions did you pick up there?")

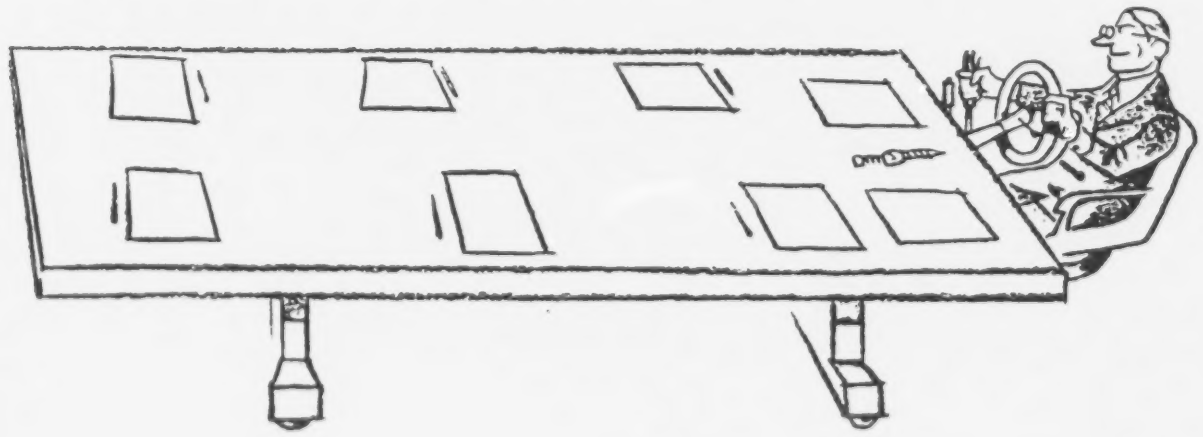
Close on a note of achievement
Even if the final item is left unresolved, you can refer to an earlier item that was well resolved as you close the meeting and thank the group.

If the meeting is not a regular one, fix the time and place of the next one before dispersing. A little time spent with appointment diaries at the end, especially if it is a gathering of five or more members, can save hours of secretarial telephoning later.

Following the meeting

Your secretary may take the minutes (or better still, one of the members), but the minutes are your responsibility. They can be very brief, but they should include these facts:

- ☐ The time and date of the meeting, where it was held, and who chaired it.
- ☐ Names of all present and apologies for absence.
- ☐ All agenda items (and other items) discussed and all decisions reached. If action was agreed on, record (and underline) the name of the person responsible for the assignment.
- ☐ The time at which the meeting ended (important, because it may be significant later to know whether the discussion lasted 15 minutes or 6 hours).
- ☐ The date, time, and place of the next committee meeting.



Writing on the Job

The Place of Writing in Business

Writing is important to business. Estimates of the time people spend writing in a normal workday run upwards of 25%. Yet some researchers believe this may even be a low estimate, since people typically don't consider time spent planning their writing to be actual writing time. If we count both the time spent writing and the time spent reading what others have written, the figure is closer to 40%. That is a lot of time and it represents a significant business expense.

Poor writing is bad business. It slows down the communication process, causes confusion, and encourages mistakes. Most businesses are inundated with paperwork. There is just too much paper around--reports are too long, memos too frequent, correspondence too burdensome. When the writing is not only lengthy but bad--filled with mistakes, poorly organized, unclear--writing becomes a hindrance rather than a tool for doing business.

But good writing is *more* than just a tool for doing business; it is itself a business product. In the widely heralded information economy, written information (whether in hard copy or electronic form) is often the commodity that is being traded. Product documentation, feasibility studies, product brochures, test reports--these all represent business products just as much as manufactured goods did. Companies have huge sums wrapped up in their information products.

Individual Writing in Business Settings

Good writing is also important at the individual level. The memos and reports that employees write serve the interests of the company, but they also serve as a primary means of individual evaluation. It may never be stated outright that you will be evaluated on your written reports or memos, but all too frequently, nobody knows what you did until you put it in writing. The impressions formed of you as a worker, especially by higher-ups who are not in your immediate work setting, are often based on what you write.

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Thus writing serves as a key means of job evaluation and plays a large role in decisions concerning promotions and merit raises. Writing serves to establish and maintain an employee's role within a company. And the higher one moves within an organization, the more important and time-consuming writing becomes (at least until one reaches the levels of upper management, when oral communication becomes more important than written). Supervisors write more than line employees; managers writer more than supervisors.

Yet the importance of writing is often not acknowledged. Researchers who look at the workplace find that many employees feel uncomfortable with their writing. Most employees feel they spend too much time writing, that their writing is weak in one of a dozen ways, that they really need to brush up on the principles of good writing. Employers will complain that they see weaknesses in the writing of others, perhaps lamenting that colleges don't do a better job of training students in essential communication skills. They will also admit that their own writing could be improved.

Many employees do not define themselves as writers or define writing as their work. They say they are test engineers, or biologists, or sales representatives, or accountants; yet these workers spend much of their time writing and many of their work activities are directly aimed at producing some written product. Many employees attempt to keep writing in a subordinate position, as something they have to do but would rather not. They see writing as a necessary evil associated with their jobs. Writing is a foe, not a friendly tool, a tool closely related to success within the organization.

The Need for Writing Training

It is ironic that the importance of good writing is not more directly confronted in business settings. We acknowledge the need for training in new methods of accounting, or in management by objectives, or in using new data processing tools, or in handling new machinery, yet companies don't often recognize the need for training in writing. Perhaps this situation is changing--a recent survey of top business executives noted that the improvement of writing skills was the number one priority for workforce training (National Public Radio, Nightly Business Report, December 19, 1989).

Writing is complicated business. Writers need a special language to work with, special techniques for editing others' written language, and special concepts for understanding what makes writing clear, forceful, and effective. Instead of working to gain these specialized competencies, many employees assume they can simply pick up what they need to know as they use the language.

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This course attempts to bring the importance of writing to the surface--to talk explicitly about good writing. As an employee, you need to know what counts as good writing, how writers think and work, and how readers respond to your writing. You need to recognize and control grammatical trouble spots and to have a language for doing so. And you need a few terms and some special skills to describe how sentences work, so you can control language and use it effectively.

The Importance of Purpose and Audience

The real key to good writing is a well-developed sense of **purpose** and **audience**. Good writing will follow once a writer decides exactly what needs to be accomplished and who can accomplish the task. And often, a clear sense of purpose and audience will prevent problems of grammar and word choice at the sentence level.

The worst kind of writing is that which has no clearly defined purpose or targeted audience. You might read a memo and wonder: "Am I supposed to do something? What is this writer's point? Why am I being told these things?" And often, this kind of writing may have annoying errors or variation in word choice that indicate the writer's uncertainty (or even lack of thought) about purpose and audience.

When you shape a piece of writing around a clearly defined purpose and audience, you give yourself a tool for deciding what to include and what to delete, what to emphasize and what to downplay, and how to order your arguments and evidence. A sharply defined sense of purpose and audience will also guide you toward an appropriate strategy and tone. With a clearly defined purpose and audience, you can begin writing to specific individuals with a clear sense of what you would like them to do. You then have a yardstick for editing and revising that lets you measure how well you are communicating your purpose to your audiences.

Multiple Purposes, Multiple Audiences

Most work environments are complicated places, and purposes for writing reflect these complications. A writer will have an obvious purpose for writing, but behind the stated purpose may lie hidden motives of personal advancement, empire building, or efforts to change or influence the organization.

For example, suppose I am a supervisor who has a problem with employees using the office photocopier for personal business. If I decide a memo is the

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best way to handle the situation, this gives me an obvious purpose for writing.

But behind the obvious purpose of stopping unauthorized uses of the machine are other, secondary purposes that make the memo a complicated business. I do not wish to alienate those who haven't used the machine for unauthorized uses. Nor do I wish to make a contest of the problem, challenging people to use the machine without being caught. And I certainly don't want my employees to get the idea that the office will be patrolled by a photocopy police squad. I would like simple cooperation from my employees; I want them to recognize the reasonable nature of my request to stop using the machine for unauthorized copying.

Most writing situations are like this--complicated, multi-faceted, somewhat touchy in their interpersonal complications.

Nor is it a simple matter to define an audience. My memo is directly addressed to those in my office with access to the photocopy machine. Yet there may be other, secondary audiences who see my memo. Perhaps my manager will review my files to evaluate my work. Perhaps I will end up having to discipline an employee who continues to use the photocopier for personal use, so my memo becomes a legal document used as evidence in the proceedings against the employee. Suddenly, new purposes and audiences open up for my "simple" memo. The words I wrote for my initial purpose may suddenly prove inadequate to the new demands on them.

You often cannot predict where a memo will end up, into whose hands it will fall in addition to those named specifically at the top. Every time you decide to copy a memo up or down the organizational hierarchy, you risk appearing to go over someone's head or appearing to be insensitive to office politics. Often, the tone and approach that is right for the primary audience--perhaps a close supervisor--is totally wrong for the secondary audience--perhaps a manager up the line.

Writing has a permanence that speaking lacks. Once you commit an idea to a paper, it has a life of its own. It ends up in files where you don't expect it and shows up at the wrong time. Before you write, your first step must be to decide whether to write at all--whether your purpose might not be better realized by telephone or face-to-face communication.

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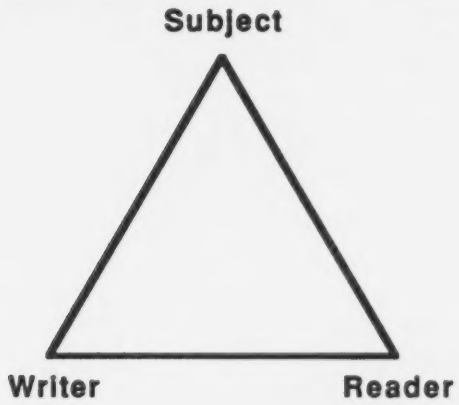
A Communication Model of Writing

Many writers find visualizing the communication situation as a triangle to be helpful in conceptualizing writing tasks:

The Communication Triangle



In this visual representation, the message--what is actually being communicated--is surrounded by those features that shape the message. At one corner is the writer, the one who usually has some purpose for sending a message. The writer sends the message to some reader or audience--represented at a second corner--who has some reason for reading the message. Finally, in the third corner there is the topic: what the message is about. So the writer, the audience, and the topic are closely related, like three corners of the same triangle.

There is more to this representation, however. Note that the writer and reader are connected by one side of the triangle. They don't exist in isolation, but are directly tied in some relationship, represented by the connecting side. Every time you write, you establish such a relationship between yourself and your audience. You assume, as a writer, a role of either asking or telling someone to do something, of either cajoling someone into cooperation or threatening someone with undesirable consequences. In other words, you don't simply send messages about the world when you write--you impose a relationship on the receiver of the message. It is in this touchy business of imposing relationships that writers often fail, for their sense of appropriate relations is often at odds with their reader's sense.

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The other sides of the triangle represent the writer's understanding of the topic and the reader's understanding of the topic, two understandings which are rarely equal. Sometimes writers get so close to their subjects, they have such thorough understandings, that they begin to have trouble imagining what their readers don't understand. They begin using jargon or acronyms (abbreviations by first letters, as in UNIX or ASU) and insider language that their readers have trouble understanding.

The relation between the reader and the topic is especially tricky because it involves not only the reader's actual understanding of and attitude towards the topic, but also the writer's estimate of that understanding and attitude. You know the feeling of reading something where the writer seems to know much more than you do. And as a reader, you may sometimes be alienated by writers who patronize you by assuming that you know less than you really do.

Surrounding the whole triangle is the very messy, complicated world that influences the written text. Deadlines, budgets, outside issues that compete for our attention--all influence the shaping of the message. How messages are produced and delivered, what the reader's frame of mind is, whether a reader actually reads the message--everything in the situation that surrounds a message helps determine its success.

The communication triangle can remind you of the complexity of most writing situations, with its key elements at each corner and the connections between these elements. Writing often feels like a balancing act, trying to achieve an appropriate balance between appearing too bossy or too undecided; between writing as an expert or writing to be fully understood (even by novices); between relying on what readers know and deciding what they need to be told. The triangle, with its geometry of perfect balance, offers you a metaphor of good writing.

Becoming a Good Writer

No book can teach you how to analyze your particular writing situations. To be a good writer--one who responds to the situational demands of particular purposes and audiences--you need all your analytical skills.

You need to be firmly in control of your work situation, understanding what needs to be accomplished and what are efficient strategies for attaining your purposes. You need to be a psychologist, understanding what motivates people and what alienates them. You need to be a manager, responsive to how duties and roles are assigned within your organization. And you need to be a politician, one who understands how to get competing groups to work harmoniously.

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To be a good writer, you also need confidence. You need to trust your insight, to believe you have good ideas worth conveying. If you are insecure about the quality of your ideas, anxious about your authority, hesitant about your ability to solve problems through writing, you'll produce writing that is obscure, riddled with jargon, impenetrable, and confusing. Many insecure workers try to hide behind their writing, throwing up smokescreens that obscure and confuse.

Confident workers are confident writers--they articulate problems clearly and offer solutions which will stand on their own merits. Good writers take responsibility, confident they have ideas others will respect and respond to. Good writers recognize that most business situations are already complicated and don't need language which further complicates matters. Good writers appreciate prose that is lean and efficient, that works hard and gets the job done without a lot of wasted words.

The problems of the vague, stuffy, bureaucratic style that are covered in this text tend to show up in the writing of employees who are new to the organization, who are insecure with their positions, or who are uncomfortable with their own authority. The principles we recommend for a vigorous, direct, active style will only feel comfortable if you are confident of the quality of your work and secure in your position within your organization. In some ways, style is the man (or woman) and only a strong, confident worker can project a strong, confident style.

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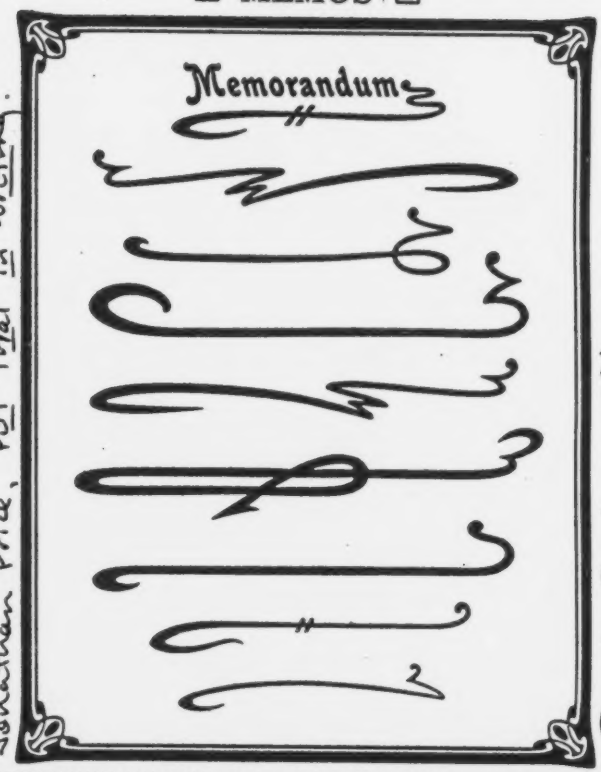

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Most memos are too ornate—even when they're not written with a quill pen. Too many words, too little point. Executives who have to read dozens of memos every day react like this:

"It's not clear what I'm supposed to do about this."
"What's the point?"

So put your idea in the first sentence. And if your company's memo pads offer you a subject line, put your idea there. If your memo stretches more than a page, you need a summary at the top. Not just a statement of the topic ("In this memo I will discuss . . ."), but a stand ("We should eliminate the Dallas plant because . . ."). And even a one-paragraph memo becomes clearer—works faster—when you start with the point.

Don't begin with the background, sidling up to your subject ("The purpose of this memo . . ."), or with elaborate definitions, warnings about the scope of the memo to come, personal remarks (unless you've got nothing else to say). If you must include any of this, put it below your opening. Subordinate the insignificant to the meaningful.

Make a Definite Recommendation

Go beyond analysis to say what you think the reader—and you—should do next. This makes the memo a trigger for action, not just another excuse for delay.

Sometimes you know what should be done, but you don't want to do it. Or you know that to decide, you need to collect some figures or interview an expert. If you're putting off that work, then you'll resist making any clear recommendation in your memo. Here's what you'll sound like:

MEMORANDUM

DATE: December 8
TO: Vice President Merker
FROM: Mel Burrows
SUBJECT: Disk Drive Failures

We have had problems with defective disk drives. This has been going on for a year. At first, we thought we could just change our manufacturing procedures, but that led to even more failures. We're now getting less than 20% of the product past Quality Assurance. Now we could go back to engineering, and ask for a new design, but that might take six months or a year. Or we could go out and buy a different drive right off the shelf. Or we could just manufacture an awful lot of them, so we could use the 20% that work. I'm not sure whether Manufacturing can handle that kind of volume. What do you think? We've got to do something soon, to meet our shipments.

"We've got to do something now." Sure, but it won't be done too fast. At least, not by Mel.

Before you write, then, take the time to do what any reader's probably going to tell you to do. Talk to the manufacturing people. Research the subject enough so you can make a considered recommendation. And ask yourself: am I prepared to act on my own recommendation? If not, revise it.

Make It Even Shorter

When you've got a first draft, go through it looking for parts to cut. Can you shrink a paragraph to a line or two? Do so, and you've chopped away some of the underbrush, so a reader can spot your ideas right off. Avoid this sort of thing:

MEMORANDUM

DATE: December 31
TO: Hank Holquist
FROM: Mel Burrows
SUBJECT: Length of Memoranda

It has come to my attention, from various sources, that some people have the feeling that our company memos are getting a little long-winded. Now I don't oppose a little detail, and I always want to hear what you have to say, but I'd like you to issue a general memorandum warning people to keep the length of all but the most important or well-researched memos short, so we don't have to spend all day reading them. If you know what I mean.

Give the Reader Air

White space helps. Open up the page so the reader's eye can zoom in on key parts, without getting stalled by a big block of type.

When possible, use headings to break up the text. With lists, spread out the items with bullets or numbers, and let some blank lines sneak in between them.

Here's one memo that started as a clump. See how much easier it is to skim after the text has been given some breathing room.

BEFORE:

MEMORANDUM

DATE: December 12
TO: Jim Brandon FROM: Mel Burrows
SUBJECT: Contract with CDN-Nippon

We should give our drive-shaft contract to CDN. The main benefits: they have the longest experience with this particular engineering, they have manufactured more of this model than anyone else, they are offering us a price 12% below any of their competitors; plus, we've worked with them before, and found their failure rate to stay consistently below 3%. The drawbacks: a month delay in startup, due to their previous commitments, and a guarantee of first option on the next contract. Our lawyers say these conditions are OK. So let's sign.

AFTER:

MEMORANDUM

DATE: December 12
TO: Jim Brandon FROM: Mel Burrows
SUBJECT: Contract with CDN-Nippon

We should give our drive-shaft contract to CDN.

THE BENEFITS:

—They have the longest experience with this particular engineering.

—They have manufactured more of this model than anyone else.

—Their price is 12% below the lowest competitor.

—We've worked with them before.

—Their failure rate is consistently below 3%.

THE DRAWBACKS:

—A one-month delay, due to their previous commitments.

—They want a guarantee of first option on our next contract.

CONCLUSION:

Our lawyers give the OK. Let's sign.

Use Familiar Organization

To speed your reader's access to your main point, follow a traditional way of organizing your material: problem and solution; main idea and proofs; and effect and causes. The reader will recognize each of these arrangements quickly, and will know where to look for your recommended course of action.

Steer clear of a simple-minded plod through events in chronological or geographical order—easy for you, but hard on the reader. Such lists exhaust themselves without building to a conclusion. They leave the reader wondering what you make of all this information—and why you're asking him or her to wade through it.

Put Your Key Idea First

Basically, move from the most important to the least important. A memo is not an opera, a cocktail conversation, or a nineteenth-century novel.

"I know there's a problem, but what does this guy think should be done about it?"
"I didn't just want facts—I wanted her opinion."

Before you write, think out your aim. If you're not clear about that, your reader won't be. What do you want your memo to do?

- To get action: persuade the boss to okay your new plan; set a deadline and schedule for a group; confirm what you will do, and what you expect others to do.
- To avoid blame: "report" the facts, while justifying yourself, or "make your case" in the files.
- To answer a question: make an argument for your ideas, under the guise of a neutral report; or say what policy you recommend.

So Make a Point

Show what you expect your reader to do next—approve your idea, blame someone else, okay your budget. Even when someone has asked you to "just outline the situation," they are likely to ask for your suggestions. Save time and put them in writing now.

Of course, saying what you think commits you to a position. You have to take a stand and not weasel out of it halfway through or mound up so much mush around your idea that no one will ever spot it again. (Cowardice breeds bad writing as its camouflage.) Be brave enough to make a real point.

Rewrite

Many people think a memo's just a note, so they can ramble on and on and touch on this and that and exit leaving a pile of

words behind. In fact, dictation encourages meandering memos like this:

MEMORANDUM

TO: Dan Knipper
DATE: December 10
FROM: Mel Burrows
SUBJECT: Marketing Meeting

Way back last October when we first got around to planning this meeting, I thought I would be back from the NCA conference—it's going to be in Hawaii this year, thank God—I'm looking forward to getting a good tan, too. Well, anyway, I figured I could easily be back in town by the 21st, but now I've got to stop off in Los Angeles on the way back, to talk to some of our subcontractors on the Galaxy Project. So I'm not sure now whether I will be back by the 21st, or even the 22nd. I'm just not sure how bad the situation is there. So what about the 23rd? Nobody really wants to meet on Christmas eve, right? I've tried reaching you on the phone, but your secretary couldn't speak to your schedule, so I figured I'd better send you this. Let me know what's best for you. Of course, when I get in, I'll be brushing sand off me. Know any good restaurants in Honolulu?

Try reducing that to two sentences—or one. You can cross out 90 percent of what's there. That done, the point emerges. And with a few changes, you've got a memo someone can answer without spending five minutes following the twists and turns of Mel's free-associating mind.

Remember, it takes longer to say something briefly—you have to cut out so much. So figure on revising two or three times, if you want the reader to grasp your idea quickly, and act on it.

Get Out Fast

Stop before your memo becomes a full-dress research paper. At the bottom of the page there should be no more than the typist's initials, and an alphabetized distribution list, if it's too long to be put on the "to" line. No "sincerely yours," and no flourishes.

If you're stapling on attachments, fine, but make sure you've described them in the memo, so the reader's prepared. And ask yourself: is this really a part of my presentation? Or is it just decoration? If it is just extra weight, leave it out.

A Memo on Memos

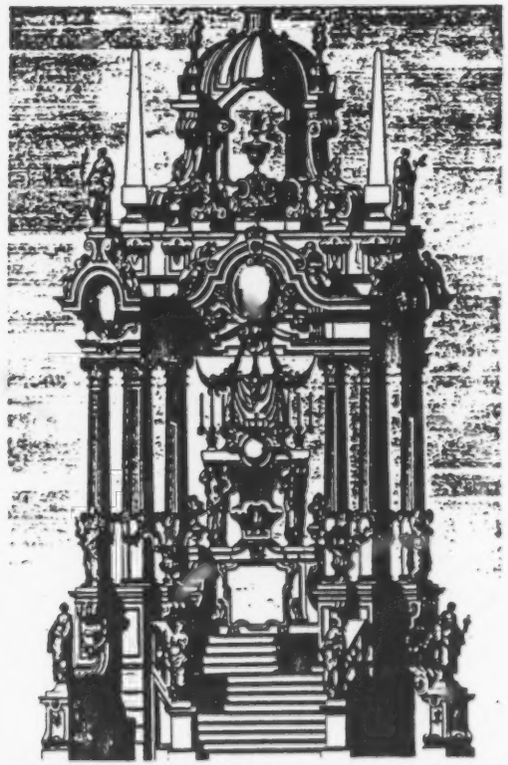
MEMORANDUM

DATE: February 15
TO: You
FROM: Jonathan Price
SUBJECT: How to Write Memos

Put your main point at the start!

- Rewrite.
- Give the reader air.
- Use familiar organization.
- Put your key idea first.
- Make a definite recommendation.
- Make it even shorter.
- Get out fast.

□ KEEP IT SHORT □



This is what too many reports end up looking like: extra comments piled on top of unnecessary sections, surrounded with useless appendices, decorated with flourishes, monuments, and filigree work. At the center, a catafalque for any idea the writer may have started with. Inside that, a coffin.

This over-decoration buries your meaning. So, if you're not

29

making sets for an eighteenth-century opera, keep it short. Pare away the extras.

Short words, short sentences, short paragraphs. Why?

- They're easy to digest.
- I can see what it's about, fast.
- I don't get cross-eyed looking at the page.
- I get frequent breaks, between the blocks of prose.

So, despite what you may have learned in school and the military, choose the small word over the big one as you write. Sometimes, of course, you must use the twenty-eight-letter term because it's the only accurate word. But when you do find two words that mean the same thing, prefer the shorter one. For instance,

REPLACE THIS:	*WITH THIS:*
Activate	Start
Implement	Run
Initiate	Start
Modification	Change
Preparatory to	Before
Re-initialize	Start over
Utilize	Use

Reduce phrases, too.

REPLACE THIS:	*WITH THIS:*
At this point in time	Now
Due to the fact that	Because
Exhibits a tendency	Tends
I am of the opinion that	I think
In a certain number of instances	Sometimes
You will find enclosed	Here is

If you do this, your sentences will tighten up, too. Long sentences are hard to follow. Most people can remember seven or

eight words at a stretch. After that, they begin to lose track. Compare these two sentences:

46 WORDS:

> For the product we have just been discussing, our reported sales figures show a definite decline in the number of units being sold, but on the other hand our profit-and-loss sheets also can be examined to indicate an equally definite uptick in dollar volume.

7 WORDS:

> We sold fewer units, made more dollars.

Which is easier to grasp? Has any meaning been lost?

I'm not recommending that you make every sentence seven words long. You'd sound like a robot—choppy and not too bright. Vary the length of your sentences according to their meanings. But trim every one. That way, when you need to make a point, you can emphasize it by drawing up short. Get it?

"Every word you add dilutes the sentence," says the contemporary American poet Miller Williams. In fact, whenever you throw in a significant qualification, you risk distracting the reader from the main idea. So watch out for sentences that:

- Combine three or four ideas. Sort them out into three or four sentences.
- Have more than one adverbial clause (beginning with *when*, *because*, *although*, *whereas*, *after*, and *before*). A hint that one should start another sentence.
- Contain more than one *that*, *which*, or *who* clause. Who's who? Which which is that? Again, a sign to turn one sentence into two or three.
- Take up more than three regular lines of text.

Look at the length of your paragraphs, too. Few things repel readers more than paragraphs that take up three-

quarters of a page. Leave that to novelists like William Faulkner.

To trim a paragraph, you can:

- Make sure you've got events in order. This may cut your paragraph in half, if you've been jumping forward and doubling back.
- Ax sentences that repeat the same information, with some minor variation or flourish.
- Leave out redundant examples.
- Throw out anything that does not focus on the central idea of this paragraph.

Here's an example:

ORIGINAL:

Our study showed that potential customers preferred even U.S. savings bonds to stocks. For instance, some would rather put their money in life insurance. Others preferred to refinance their mortgages. Some just put their money in savings accounts. Remember that in our survey we asked people what they would do with $10,000 extra cash. We found stocks came in ninth, after other types of investment. Another way to put this is that our brokers face a difficult job persuading people to shift funds out of these other types of investment, into stocks. Of course, we may need to hire a different breed of broker. But that's another kettle of fish. The really important thing to keep in mind here is that we have a hard row to hoe before we'll get people to invest in stocks.

REVISION:

When we asked potential customers what they would do with $10,000 extra cash, they said they'd put it in eight

types of investment—including life insurance and U.S. Savings Bonds—before they bought stocks. So our brokers face a difficult job of persuasion.

A paragraph ought to express an idea—one idea. The sentences inside offer refinements, details, evidence. If they don't support that idea, they're in the wrong paragraph.

In some ways writing resembles carpentry. The longer most carpenters work, the more they love simple forms. When the Italian designer Giuseppe Galli Bibiena showed an old carpenter the design for the elaborate monument in the picture at the beginning of this chapter, the carpenter asked, "Is it a cake or a tomb?"

SECTION: FOURTEEN	PAGE 1
SUBJECT: PROGRESSIVE DISCIPLINE	OF 4
APPROVED ADMINISTRATOR	DATE: 3/79 REV: 3/1/81 9/1/85 7/1/85 6/1/88

I. PURPOSE

To assist managers and supervisors in making MGHer's aware and responsible for correcting inappropriate behavior, attendance problems or performance deficiencies.

II. WHO

All MGHers

III. POLICY

A. It is the responsibility of management and supervision to inform MGHers, in progressive steps, if practical, of deficiencies in attendance, work performance or behavior at work.

B. Misconduct, as defined by MGH management, may result in immediate termination following a predetermination hearing.

C. Probationary MGHers will be informed of their deficiencies and can be terminated without the benefit of progressive - constructive discipline, or a predetermination hearing.

IV. GUIDELINES

A. Progressive Discipline

1. Progressive discipline is defined as informing an MGHer utilizing verbal counseling, written counseling and disciplinary action in such a way that the MGHer is aware of his/her deficiency and realizes what corrective action is necessary and what will happen if that action is not taken. The MGHer needs to have enough specific information to be responsible for his/her change of behavior.

2. Verbal warnings should be recorded and retained by the supervisor in case they need to be referred to at a later date.

3. "Suspension Without Pay" and "Decision-Making Leaves With Pay" may precede the "terminating" decision. See definition below. This ensures that the MGHer realizes his/her employment is in jeopardy.

MEMORIAL GENERAL HOSPITAL

EVALUATION OF SUPERVISOR PERFORMANCE

CHARGE NURSE

TO THE RATER

In the appropriate box mark the criteria indicating its importance to the job, as related to the job description. Mark:

0 if the element being evaluated is of no importance or of only minor importance

✓ if the element being evaluated contributes, but is not essential, to good performance

\+ if the element being evaluated is important to the job.

Mark each criteria with the number that best describes the employee's performance as follows:

(1) Is so outstanding that it deserves special mention.

(2) Has demonstrated ability that is above that expected of a competent employee.

(3) Competently meets all requirements.

(4) Performance exhibits a weakness regarding the criteria.

(5) Is not meeting the requirements necessary regarding the criteria.

(X) If the employee does not have the opportunity on the job to show ability in this respect.

A rating of "3" describes competent performance. Any ratings of "4" or "5" must be supported by facts, with examples if possible. In addition, explanations of prior written warnings are customary. State the areas of performance in need of improvement, and outline follow-up plans for remedial action.

Use the "Comment" section to explain the ratings given in that section.

After completing the evaluation, discuss it with the employee so that he/she will know the standards you are applying. Give the employee the opportunity to add any remarks he/she wishes to make in the spaces provided for that purpose. This discussion can serve as a guide to the employee in realistic career planning.

Name of Employee

Title & Grade

RN - Charge Nurse

Title & Grade

RN - Manager

Period Covered by this Evaluation

1

1.
PLANNING:

⊞ 2 A. Plans ahead. Considers the overall objectives of the department and the hospital.

⊞ 2 B. Knows standards to be met (quality, time, cost, etc.).

⊞ 2 C. Accurately forecasts work group needs (staff, equipment, supplies, etc.).

⊞ 2 D. Sets out clear, logical procedures to be followed. Considers work methods, staff schedules, equipment and/or supply handling and performance checks.

⊞ 2 E. Keeps plans flexible. Makes some provisions for dealing with unexpected problems, emergencies, and deviations from routine.

⊞ 2 F. Works toward the best patient care and service in the shortest time, at the lowest cost, and with the least pressure on his/her work group.

COMMENT: Does look at each days schedule ahead of time. Projects need for additional resources as well as less resources and takes appropriate steps to adjust staffing etc.

2.
ORGANIZING:

⊞ 2 A. Budgets own time wisely.

⊞ 2 B. Delegates and divides the work for top quality and efficiency.

⊞ 2 C. Makes clear, precise assignments.

⊞ 2 D. Starts work moving without delay.

COMMENT: Insures that am admits & Cardiac Caths are ready for procedures as quickly as possible.

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3.

CONTROL

⊞ 2 A. Sees that care and/or service is up to hospital standards.

⊞ 2 B. Is concerned for safety and spots injury, accidents, and/or fire hazards and takes action promptly.

⊞ 2 C. Sees that hospital equipment and supplies are used properly, safely, carefully, and economically.

⊞ 2 D. Reports work area repair, cleaning and other maintenance needs promptly.

⊞ 2 E. Sees that accurate, up-to-date records are kept.

COMMENT: Is very concerned for unit environment and public perception.

4.

MOTIVATION AND COMMUNICATION

⊞ 2 A. Shows genuine interest in subordinates as individuals.

⊞ 2 B. Creates work group pride. Builds a team feeling of value and importance in the hospital.

⊞ 2 C. Acts as effective spokesperson for his/her work group. Supports or defends subordinates when convinced they're right.

⊞ 2 D. Opens -- and keeps open -- genuine two-way communication with subordinates:

2 ____ Listens to what they have to say

2 ____ Keeps them informed

3 ____ Schedules regular private and group meetings with them

2 ____ Encourages and practices frank and open discussion of work matters

1 ____ Acts promptly when presented with a question, problem or complaint

2 ____ Squelches fears, rumors, and suspicions with facts

⊞ 2 E. Give subordinates a part in recommending and planning work group changes, improvements, or re-organization. Encourages and gives proper credit for suggestions.

⊞ 3 F. Conducts objective, constructive Performance Evaluations.

⊞ 3 G. Prepares and submits all required and/or requested reports promptly, clearly, and thoroughly.

COMMENT: If a problem or question arises, she will follow through with it to conclusion/resolution, often stays over to do this. Goes directly to source or supervisor with rumors, reports back to group.

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5.
PLANNING

⊞ 2 A. Carefully plans new employee orientation and training.

⊞ 2 B. Coaches, rather than criticizes, subordinates. Encourages questions. Offers help. Praises often.

⊞ 2 C. Seeks ways to develop subordinates for peak performance, career growth, and promotion. Contributes to improvement of in-service training programs.

⊞ 2 D. Assists new employee in adapting to the hospital environment.

COMMENT: Is very concerned about developing all employees to obtain optimum performance/job satisfaction

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6.
DISCIPLINE

⊞ 3 A. Knows hospital policies and procedures. Makes every effort to apply them fairly and uniformly.

⊞ 2 B. Steps in promptly when employee conduct could disrupt or endanger patient care or service.

⊞ 2 C. Investigates discipline problems objectively and throughly. Listens to the employee's side.

⊞ 2 D. Issues verbal reprimands and warnings tactfully.

☑ X E. Follows-up on tardiness and absence.

COMMENT: Is still learning hospital/division/area policies + procedures
Is quick to come to supervisor with any grey/unknown areas.
Brings conflicts/problems to my attention.
X is always polite and tactful
Absenteeism and tardiness problems are handled by supervisor,
X has little or no opportunity to follow up in these areas.

7.
SELF-DEVELOPMENT AND ATTRIBUTES

⊞ 1	A.	Alert and receptive to new ideas, procedures and advances in his/her field. Actively continues to learn.
⊞ 1	B.	Adaptable to major changes in the department.
⊞ 2	C.	Willing to accept added responsibilities and assignments.
⊞ 2	D.	Dependable. On duty when scheduled. Rarely absent.
⊞ 2	E.	Participates in hospital education programs, including management development courses.
⊞ 2	F.	Is able to perform effectively under pressure.
⊞ 2	G.	Able to keep job, home, community, and other concerns and interests in balance.
⊞ 2	H.	Acts naturally and openly. Willing to admit to an error, to be human.
⊞ 2	I.	Safeguards his/her own health.

COMMENT: Recently recertified as nurse practioner
Attends inservice voluntarily, does not need prodding.

8.
SUPPORT OF THE HOSPITAL

⊞ 2	A.	Shows an interest in and dedication to the hospital as a whole.
⊞ 2	B.	Recognizes and encourages needed changes that would: (1) improve patient care, (2) reduce costs, or (3) make his/her work group or the total hospital more efficient.
⊞ 2	C.	Works harmoniously with others in his/her department. Cooperates with those in other departments. Criticizes privately. Credits publicly.
⊞ 2	D.	Doesn't hesitate to ask questions about hospital policies, programs, or plans, but follows through when decisions are final.
⊞ 2	E.	Supports hospital off-duty. Praises its patient care, services, facilities and staff.
⊞ 2	F.	General behavior and professional conduct reflect credit on the hospital.

COMMENT:

SUMMARY Additional facts, specific achievements, strengths, weaknesses, or suggested improvements not covered under previous items.)

is a very conscientious employee in both her role as a staff nurse and Charge Nurse. She tends to take care of situations and problems very quickly as they occur which leads to fewer reoccurrances. Her technical skills are excellent and she constantly strives to keep up with latest trends. I have seen grow and develop very much this past year in her Charge nurse role. She has been very effective at helping the CARE unit standards high as well as patient satisfaction.

FOLLOW-UP PLANNED I am aware that is not fully comfortable with asserting herself/her position with some older aggresive employees, but she has been working on this and seeks guidance/assistance as needed. is quickly learning the QA program functions for her job.

① Merit Increase
② Attend Charge Nurse Seminar (dates TBA)
③ Attend Step Ahead Supervisors Communication Course April 91.

EMPLOYEE REVIEW: (Record any comment you have in the space under each rating element, or use the space below, referring to the number and letter of the item you are discussing.)

I have reviewed this completed evaluation and it has been discussed with me.

3/8/91 _____
(DATE) (EMPLOYEE'S SIGNATURE)

My comments on this evaluation are as follows:
I will be taking the Step-Ahead program March 18, 1991 on Communication. I appreciate the leadership that Frances that has given me.

Prepared By: _____ Date: 3-7-91

Reviewed By: _____ Date: 3/7/91

PLEASE ATTACH AND/OR COMPLETE CRITERIA BASED EVALUATION.

PERFORMANCE APPRAISAL ADDENDUM: CHARGE NURSE

Instructions: Place a mark in the area measuring each factor at a point that most closely indicates your appraisal. The review should reflect a sound and impartial assessment of the employee's performance on currently assigned responsibilities. Consider the entire review period and consistencies in performance levels. Reference to job description will help make a realistic appraisal.

Definition of terms: Consistently - 90-100% of the time Frequently - 50-75% of the time Rarely - less than 40% of the time		CONSISTENTLY		FREQUENTLY		RARELY
1.	Provides for nursing care on the unit and coordinates patients total needs with other members of health care team.	✓				
2.	Assigns nursing duties based on patient needs, available staff, staff competencies and unit needs.	✓				
3.	Identifies and resolves problems.	✓				
4.	Plans and evaluates with other staff members appropriate patient care and documentation of same.	✓				
5.	Communicates with supervisor and PCC when employee conduct doesn't comply with hospital policy.	✓				
6.	Supervises all aspects of patient care given by other RN's, [redacted], NA's, and secretaries.	✓				
7.	Communicates pertinent information regarding patient condition to physician and nursing supervisor.	✓				
8.	Maintains current/complete patient records.	✓				
9.	Supports philosophy, aims, and policies of Memorial General Hospital.	✓				
10.	Orients new personnel.	✓				
11.	Uses equipment and supplies in an economical manner.	✓				
12.	Prepares employees evaluations for review by Patient Care Coordinator.	✓				
13.	Attends inservice, C.E. programs and workshops to keep clinical skills current.	✓				

M5

Professional Communication Log (___/___/___)

activity	time (how many minutes?)	type (writing, face-to-face, meeting, reading,phone)	Action / Outcome	Quality (+ o -)
#1				
7L	87			88

Professional Communication Log (___/___/___)

activity	time (how many minutes?)	type (writing, face-to-face, meeting, reading,phone)	Action / Outcome	Quality (+ o -)
#1				

Professional Communication Log (___/___/___)

activity	time (how many minutes?)	type (writing, face-to-face, meeting, reading,phone)	Action / Outcome	Quality (+ o -)
#1				